

Statewide Portal/Mobile Application Statement of Work

Table of Contents

1	SCOPE OF WORK	3
1.1	GENERAL	3
1.2	PHASE 1 – DESIGN, DEVELOPMENT AND IMPLEMENTATION	3
1.3	PHASE 2 – OPTIONAL ENHANCEMENTS	4
1.4	PHASE 3 - MAINTENANCE AND OPERATIONS (M&O)	4
1.5	MANDATORY STATEMENT OF WORK (SOW) COMPONENTS.....	5
1.5.1	Project Management.....	5
1.5.2	Design and Development	6
1.5.3	Language Translations	6
1.5.4	Testing	7
1.5.5	Implementation	7
1.5.6	Final Acceptance.....	8
1.5.7	Phase 2 Optional Enhancements	8
1.5.8	Phase 3 Maintenance and Operations	8
1.6	STATEWIDE PORTAL/MOBILE APP DELIVERABLES.....	9
1.7	STAFFING REQUIREMENTS	14
1.7.1	Portal/Mobile App Key Staff	15
1.7.2	Project Location and Core Hours	19
1.7.3	Statewide Portal/Mobile App Contractor Staff Changes.....	19
1.7.4	Staff Performance.....	19
	Table 1 – Statewide Portal/Mobile App Deliverables.....	9
	Table 2 – Portal/Mobile App Project Manager Qualifications.....	16
	Table 3 – Portal/Mobile Application Development Lead Qualifications	17
	Table 4 – Portal/Mobile Test Lead Qualifications	18
	Table 5 – Portal/Mobile User Interface Lead Qualifications.....	19

1 SCOPE OF WORK

1.1 GENERAL

The Portal/Mobile App Contractor shall be responsible for performing activities required to design, develop, and implement the Portal/Mobile infrastructure and application solution. All Portal/Mobile App development must adhere to current program policy. Consortium, County, state, advocate and user engagement is expected throughout the design, development and testing aspects of the project. The Contractor shall also be responsible for the M&O of the Portal/Mobile App. The Contractor shall perform Project tasks and provide respective Deliverables as part of three phases:

- Phase 1 – Design, Development and Implementation (DD&I) Phase
- Phase 2 – Optional Enhancements
- Phase 3 – M&O Phase

Contractors must propose a schedule and work plan for Phase 1. Phase 1 must be completed within fourteen (14) months inclusive of all defined Phase 1 tasks, Deliverables and milestones. Phase 1 is scheduled to begin in August 2020 and must conclude with Final Acceptance no later than September 30, 2021.

Phase 2 will include development and implementation of Optional Enhancements. It is the intent of the Consortium to contract for the Phase 2 Optional Enhancements provided the Contractor has performed its contractual obligations in a satisfactory manner in Phase 1 and funding approval has been provided by applicable State and Federal sponsoring agencies. The Contractor shall determine and indicate the extent to which Phase 2 Optional Enhancements can be completed within the Phase 1 timeframe. The Contractor shall determine and indicate a release date for all Phase 2 Optional Enhancements as part of the completion of the ***Attachment A – Price Proposal Schedules***.

The subsequent Phase 3 M&O shall have an initial term of one year with up to two (2) optional one-year extensions as determined by the Consortium, dependent upon Contractor performance during Phase 1 and/or Phase 2, and subject to funding approval by the applicable State and Federal sponsoring agencies. The Contractor is required to maintain, operate and enhance the Portal/Mobile App during the M&O period. If the Consortium elects not to proceed with Phase 2, M&O will commence after completion of Phase 1.

1.2 PHASE 1 – DESIGN, DEVELOPMENT AND IMPLEMENTATION

Phase 1 includes all project management, requirements confirmation, UCD, development, test (inclusive of providing support for UAT) and implementation work required to create and deploy the Portal/Mobile App in the AWS cloud environment, based upon the requirements set forth in ***Attachment J – Statewide Portal/Mobile Application Requirements Cross-Reference Matrix***, on all tabs except those labelled Phase 2 – Optional Enhancements.

All Deficiencies identified by either the Contractor or Consortium during Phase 1 must be corrected, as determined by the Executive Director, prior to Final Acceptance of the Portal/Mobile App by the Consortium.

The Contractor shall implement the Portal/Mobile App in a single cut-over event during September 2021, in accordance with the approved CalSAWS schedule as reflected in the CalSAWS Roadmap, Figure 4.

1.3 PHASE 2 – OPTIONAL ENHANCEMENTS

Phase 2 includes a defined set of Optional Enhancements that may be included in the Portal/Mobile App. Contractors are directed to review the requirements for Phase 2 Optional Enhancements and determine the extent to which these enhancements can be incorporated during the Phase 1 timeframe. The requirements for Phase 2 are set forth in Attachment J – Statewide Portal/Mobile Application Requirements Cross-Reference Matrix, on the tab labelled Phase 2 – Optional Enhancements. The Consortium is keenly interested in including Phase 2 Optional Enhancements into the Portal/Mobile App as soon as possible but does not want to put the Phase 1 DD&I schedule at risk. Provided the Consortium decides to proceed with the Phase 2 Optional Enhancements, the Contractor must complete the enhancements in accordance with the schedule approved by the Consortium. The Contractor shall design, develop and implement Phase 2 Optional Enhancements as directed by the Consortium.

1.4 PHASE 3 - MAINTENANCE AND OPERATIONS (M&O)

Phase 3 includes ongoing project management, application maintenance, enhancements and operation of the Portal/Mobile App in the production environment. M&O Services include the continued provision of Consortium requested enhancements to the Portal/Mobile App software (e.g., work associated with development of new application functionality and enhancements of the Portal/Mobile App). It is important that the Portal/Mobile App remain consistent with current program policy throughout the M&O phase. During the M&O phase, the Contractor must also track, analyze and report usage and engagement trends and metrics with the purpose of improving the Portal and Mobile Apps based on factual usage data.

During the initial 1-year M&O period, the Contractor must incorporate enhancements to the Portal/Mobile App as directed by the Consortium. If the option to extend M&O services is exercised, the Contractor must follow and adhere to the standard processes for CalSAWS application maintenance and enhancements. Specifically, the Contractor will be required to document proposed changes as formal System Change Requests (SCRs). Contractors should refer to the procurement library for the current version of the CalSAWS M&O Handbook; this document provides information regarding the SCR process and workflow, prioritization, planning, approvals, the SCR Review Board and the Change Control Board.

1.5 MANDATORY STATEMENT OF WORK (SOW) COMPONENTS

The required elements in the Portal/Mobile App Statement of Work are:

- a. Project Management
- b. Design and Development
- c. Language Translations
- d. Testing
- e. Implementation
- f. Final Acceptance
- g. Optional Enhancements
- h. M&O

1.5.1 Project Management

The Portal/Mobile App Contractor is responsible for staffing and managing the tasks associated with each of the following Project management areas. The Contractor shall:

- Involve stakeholders, advocates and clients in UCD activities during requirements confirmation, design, development and UAT processes to elicit appropriate input.
- Perform general project management tasks for the Portal/Mobile App Project, including communication management, issue and risk management, scope management, Deliverable Expectation Document (DED) and deliverable management and contract management. These key project management activities will be performed in accordance with existing CalSAWS project management processes and standards, as documented in the approved CalSAWS Project Control Document (PCD) contained in the procurement library.
- Document decisions made during requirements confirmation, design, development and test tasks.
- Manage and control the delivery of the Portal/Mobile App software, and deployment support to the AWS cloud environment.
- Establish and maintain the Portal/Mobile App Work Plan inclusive of tasks, milestones, Deliverables and resources required to plan and execute the required scope of work.
- Prepare and submit Deliverable Expectations Documents (DEDs) for all required Deliverables. It is important to note that user satisfaction will be a key factor in achieving acceptance of the UCD-based Application Design Deliverable and as part of the UAT exit criteria (as a precursor to Go-Live). As part of DED development and acceptance, the user satisfaction criteria will be defined in measurable, quantifiable terms.
- Coordinate and work cooperatively with the CalSAWS DD&I contractor project team and other vendors (such as Quality Assurance and IV&V). Effective

communication within and across the Consortium, the Counties and all vendors is of critical importance to the Consortium.

- Provide a written Monthly Portal/Mobile App Status Report and verbal status reports during standing weekly, monthly and quarterly management meetings, including the quarterly stakeholder engagement group.

1.5.2 Design and Development

The Portal/Mobile Design and Development task includes two focus areas: the technical infrastructure and the application. The Contractor is responsible for staffing and managing all aspects of the Design and Development task.

The Contractor shall design and develop the Portal/Mobile App based on UCD principles. The Contractor, with assistance and cooperation from Consortium staff, shall employ a robust UCD process to engage Consortium, County and state staff, advocates and clients throughout the development lifecycle. While the State will take the leadership role in the selection and management of advocates and clients, the Contractor shall train, interact with, engage and elicit feedback from the advocate and client participants throughout the DD&I phase.

Design and Development includes the following primary activities:

- **Confirm Requirements** – The Contractor shall engage Consortium, County and state staff, advocates and clients in requirements confirmation, clarification and elicitation sessions. Requirements confirmation is a process during which the requirements documented in Attachment J – Statewide Portal/Mobile Application Requirements Cross-Reference Matrix, will be reviewed, refined, validated and confirmed.
- **Develop a Requirements Traceability Matrix (RTM)** – The Contractor shall develop and maintain an RTM to track and ensure all requirements are satisfied and managed throughout the system lifecycle.
- **Design and Develop the Technical Infrastructure** – The Contractor shall design, develop, test and deploy the technical platform upon which the application will execute and operate in the AWS cloud in accordance with the requirements documented in Attachment J – Statewide Portal/Mobile Application Requirements Cross Reference Matrix, and according to the Project schedule.
- **Design and Develop the Application** - The Contractor shall use a methodology that supports the most expedient Design, Development and Implementation of the application, including UCD and client engagement, in accordance with requirements contained in Attachment J – Statewide Portal/Mobile Application Requirements Cross Reference Matrix and according to the Project schedule.

1.5.3 Language Translations

The Contractor shall provide an approach to translating the CalSAWS portal and mobile applications, including HELP features, in State-approved threshold languages. The approach to language translations includes, but is not limited to, the following activities:

- Perform Language Translations – The Contractor shall provide translation services necessary to perform language translations as defined in Attachment J – Statewide Portal/Mobile Application Requirements Cross Reference Matrix, Phases 1 and 2.
- Until all translations are available, the Contractor shall propose a solution to provide an alternative workaround to address recipient requests for materials in languages other than threshold languages proposed in Phase 1.
- The Contractor shall provide an approach to incrementally add language translations during Phase 2 and the M&O period.
- The Contractor shall work with and support translation activities necessary during testing processes.
- The Contractor shall work with and support the Consortium, counties and State during the translation review, validation and acceptance process. The Contractor shall include an approach for how they will seek input on the development of translated materials by people who are native speakers of those languages.
- The Contractor shall propose a quality assurance/validation process of the translated materials.

1.5.4 Testing

The Portal/Mobile App Contractor shall conduct the System Test and assist the Consortium with the UAT. The Contractor shall perform the following work relating to System Test and UAT, including but not limited to:

- Develop the Master Test Plan that defines and describes all phases of the Portal/Mobile App testing approach including test stage entrance/exit criteria, test tools, test management processes, defect management, configuration management, and test roles/responsibilities.
- Create test environments to execute all stages of System testing, including a separate UAT environment that supports remote access for designated Consortium, County and state staff, advocate and client testers.
- Develop, maintain and execute the System test scripts, as applicable, at all stages of System Testing.
- Support the UAT environments and Consortium, County, state advocate and client testers to facilitate execution of UAT including promptly correcting deficiencies, promptly promulgating updated code into the UAT environments and notifying the Consortium of corrected deficiencies to facilitate retest efforts.

1.5.5 Implementation

The Portal/Mobile App Contractor shall perform the following activities in support of implementation, including but not limited to:

- Coordinate with the other CalSAWS portal vendors to prepare for and transition to the new Portal/Mobile App.
- Prepare and maintain supporting training materials for county staff, clients, potential clients, application assisters and authorized representatives
- Prepare and maintain online training and help for county staff, clients, potential clients, application assisters and authorized representatives.
- Prepare and maintain a user guide for county staff with instructions about information flows between the Portal and CalSAWS.
- Instructional “how to” video help accessible from the Portal landing page for all users.
- Training environments available for county and application assister use in learning Portal/Mobile functionality.
- Implement the new application as a single, cut-over activity.

1.5.6 Final Acceptance

Following successful cutover of the Portal and the Mobile App to the production environment, the Contractor will provide two separate Implementation Complete Reports certifying that all Portal and Mobile App requirements have been met and all known Deficiencies have been corrected. For a period of ninety (90) calendar days immediately following the completion of the implementation cutover event, the Contractor shall monitor and report any Deficiencies to the Consortium. Upon occurrence of a Deficiency, the Contractor shall document and correct such Deficiencies and provide evidence to the Consortium of their disposition. The Portal and Mobile App shall achieve Final Acceptance if and when the two Implementation Certification Reports are approved, and all Deficiencies identified during the ninety (90)-calendar day period immediately following the implementation cutover event have been corrected.

1.5.7 Phase 2 Optional Enhancements

The Consortium has identified a set of Optional Enhancements as part of the Phase 2 requirements. If approved by the Consortium, the Contractor shall Design, Develop, test and Implement Optional Enhancements in accordance with the Contractor’s development and implementation methodology.

1.5.8 Phase 3 Maintenance and Operations

The Contractor shall provide system M&O, which shall include all goods and Services necessary to manage, operate, enhance and support the Portal/Mobile App to comply with the approved Portal/Mobile M&O Plan and maintain the Portal/Mobile App consistent with current program policy for the term of the Agreement.

1.6 STATEWIDE PORTAL/MOBILE APP DELIVERABLES

This section defines the Portal/Mobile App Contractor Deliverables as outputs of required SOW tasks. The structure and format for each Deliverable must be documented and approved through a formal DED process as defined by the existing Consortium Project management processes. The following table includes the list of required Deliverables. Some deliverables specify a due dates. For all others, the Contractor shall specify due dates for DEDs and Deliverables in the Work Plan.

Table 1 – Statewide Portal/Mobile App Deliverables

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
DELIVERABLE 1 - WORK PLAN	THE CONTRACTOR SHALL DEVELOP A PORTAL/MOBILE WORK PLAN THAT INCLUDES THE FOLLOWING:
	A. Task and subtask descriptions with Deliverables specifically indicated;
	B. Estimated number of Portal/Mobile App Contractor staff identified by levels and types;
	C. Estimated hours by task and subtask; and
	D. Gantt charts showing planned start and end dates (durations) of all tasks, subtasks, and major milestones and Deliverables, including time frames for the Consortium's review and approval of all resulting Deliverables.
	THE WORK PLAN MUST BE UPDATED MONTHLY TO REFLECT THE FOLLOWING:
	A. Task and subtask percent complete;
	B. Actual number of Portal/Mobile App Contractor staff;
	C. Actual hours by task and subtask; and
	D. Updated Gantt charts.
	THE INITIAL WORK PLAN MUST BE SUBMITTED WITHIN TWENTY (20) CALENDAR DAYS OF PROJECT INITIATION AND UPDATED AND SUBMITTED ON A MONTHLY BASIS.
DELIVERABLE 2 - MONTHLY STATUS REPORT	THE CONTRACTOR SHALL PROVIDE A MONTHLY STATUS REPORT THAT PROVIDES DETAILS REGARDING PARTICIPATION BY THE PORTAL/MOBILE APP CONTRACTOR TEAM. AT A MINIMUM THE MONTHLY STATUS MUST INCLUDE THE FOLLOWING:
	A. An executive summary (Both MS Word and MS PowerPoint formats);
	B. An updated summary of the Work Plan progress against the approved baseline Work Plan;

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
	C. An updated list of DEDs and Deliverables drafted, in process, submitted and approved during the period;
	D. Issues identified by or assigned to the Portal/Mobile App Contractor; and
	E. Risks identified by or assigned to the Portal/Mobile App Contractor.
	THE MONTHLY STATUS REPORT MUST BE SUBMITTED WITHIN FIVE (5) CALENDAR DAYS AFTER THE COMPLETION OF A MONTH.
DELIVERABLE 3 - USER CENTERED DESIGN PLAN	THE CONTRACTOR SHALL PROVIDE A USER CENTERED DESIGN PLAN THAT PROVIDES THE APPROACH FOR CONSORTIUM, COUNTIES, STATE, CLIENT AND ADVOCATE PARTICIPATION DURING REQUIREMENTS CONFIRMATION, DESIGN TEST AND ONGOING M&O ACTIVITIES. AT A MINIMUM THE UCD PLAN MUST INCLUDE THE FOLLOWING:
	A. Approach to UCD, development and test including the application of UCD tools, such as focus groups, participatory design sessions, observations of users interacting with the technology and 1:1 interviews;
	B. Roles and responsibilities of the Contractor, Consortium, Counties, state, advocates and clients;
	C. Communication processes to engage the Consortium, Counties, state, advocates and clients during the design, development and test activities;
	D. Identification and tracking of metrics associated with the overall user experience and application of best practices to a continuous improvement cycle;
	E. How business outcomes will be achieved in a dynamic, intuitive, and user-friendly manner through robust UCD;
	F. Approach to UCD during the M&O Phase, including ongoing user research and solution identification to be conducted as part of system maintenance and improvement over time. Activities could include (but not be limited to): <ul style="list-style-type: none"> • Usage data assessment and analysis; • Yearly usability review that includes a number of measures with qualitative feedback from consumers and application assisters; • Assessing findings from yearly usability review for implementation updates and improvements; • Using UCD for implementation of new features as dictated by policy changes; and
	G. Assumptions.

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
DELIVERABLE 4 - REQUIREMENTS TRACEABILITY MATRIX	THE CONTRACTOR SHALL CREATE A REQUIREMENTS TRACEABILITY MATRIX (RTM) THAT TRACKS THE REQUIREMENTS DEFINED IN THE ATTACHMENT J - STATEWIDE PORTAL/MOBILE APPLICATION REQUIREMENTS CROSS-REFERENCE MATRIX. THE RTM SHALL PROVIDE THE BASIS FOR MONITORING AND CONTROLLING THE EVOLUTION OF THE FUNCTIONALITY THAT WILL FULFILL EACH REQUIREMENT THROUGHOUT THE DESIGN, DEVELOPMENT, TEST AND IMPLEMENTATION TASKS. THIS MATRIX AND UPDATES MUST BE DELIVERED AS FOLLOWS:
	A. The initial RTM must be submitted within 60 calendar days of Project initiation;
	B. RTM Update 1 is due ten (10) calendar days following the conclusion of the requirements confirmation process;
	C. RTM Update 2 is due ten (10) days following the conclusion of the design process;
	D. RTM Update 3 is due ten (10) days following the conclusion of the testing process; and
	E. RTM Update 4 is due ten (10) days following Final Acceptance.
DELIVERABLE 5 – PORTAL GENERAL SYSTEMS DESIGN	THE CONTRACTOR SHALL PROVIDE THE GENERAL SYSTEMS DESIGN, WHICH WILL CONTAIN AND ADDRESS THE FOLLOWING:
	A. Methodology and Assumptions;
	B. Mock Application Page Layouts including navigation;
	C. Storyboards, wireframes and prototypes as applicable;
	D. Reports and Dashboard Layouts;
	E. Logical Data model(s);
	F. SAWS Interface specifications; and
DELIVERABLE 6 – PORTAL TECHNICAL SYSTEMS DESIGN	G. Business Rules.
	THE CONTRACTOR SHALL PROVIDE THE TECHNICAL SYSTEMS DESIGN THAT WILL CONTAIN A COMPREHENSIVE ARCHITECTURAL OVERVIEW OF THE PORTAL SOFTWARE, INCLUDING A DEPICTION OF EACH LAYER AND AREA OF APPLICATION IN TERMS OF SOFTWARE COMPONENTS. IT WILL INCLUDE:
	A. Technical Architecture specifications;
	B. System components and entity relationship diagrams;
	C. Network topology diagrams, including Cloud computing environment;

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
	D. Information Security design (application and network security protocols);
	E. Application architecture design (software layers);
	F. Webservice/API design;
	G. Physical Data Model;
	H. Physical and logical directory path locations; and
	I. Format library specification, and update tools.
DELIVERABLE 7 - MASTER TEST PLAN	THE CONTRACTOR SHALL PROVIDE A MASTER TEST PLAN WHICH WILL ENCOMPASS THE APPROACH AND PROCESSES FOR ALL STAGES OF SYSTEM TESTING, INCLUDING REGRESSION TESTING, AND ENSURE ALL SYSTEM REQUIREMENTS AND SPECIFICATIONS ARE FULLY TESTED AND VERIFIED. THE SYSTEM TEST PLAN MUST INCLUDE BUT IS NOT LIMITED TO THE FOLLOWING:
	A. A description of the purpose and structured test approach for each stage of System testing;
	B. A description of Contractor, Consortium, County, state, advocate and client testing roles and responsibilities;
	C. A description of tools, environments and controls to be used during each stage of system testing;
	D. System test schedule;
	E. Standards for scenario and script development, execution and sign-off;
	F. Processes for identifying, documenting and tracking Deficiencies, corrections to Deficiencies and re-tests once corrected code is promulgated to the system test environments;
	G. Standards and metrics for weekly and monthly test status reporting;
	H. Tracking to the test condition level; and
	I. Entrance and exit criteria for each stage of system testing.
	CONTRACTOR SHALL DESCRIBE UAT SUPPORT TO INCLUDE:
	A. Overall approach for supporting UAT;
	B. A description of processes Contractor will perform to support the UAT;

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
	<p>C. A description of tools, environments and controls to be provided and supported during the UAT;</p> <p>D. A proposed UAT schedule;</p> <p>E. A description of Contractor, Consortium, County, state, advocate and client roles, responsibilities and resources needed to perform the UAT;</p> <p>F. UAT metrics, including UCD metrics, and problem/deficiency reporting, tracking and correction/resolution process; and</p> <p>G. Entrance and exit criteria for UAT, which will include user satisfaction and experience.</p>
DELIVERABLE 8 – PORTAL IMPLEMENTATION COMPLETE REPORT	THE CONTRACTOR SHALL PROVIDE AN IMPLEMENTATION COMPLETE REPORT WHICH CERTIFIES THAT ALL PORTAL REQUIREMENTS HAVE BEEN MET AND THAT ALL KNOWN DEFICIENCIES HAVE BEEN CORRECTED.
DELIVERABLE 9 - MAINTENANCE & OPERATIONS (M&O) PLAN	THE CONTRACTOR SHALL PROVIDE AN M&O PLAN TO DOCUMENT THE APPROACH FOR COMPLETING REQUIRED M&O TASKS FOR THE DEFINED PHASE 3 M&O PERIOD. THE M&O PLAN MUST CONTAIN AT A MINIMUM THE FOLLOWING:
	A. Overall approach to M&O;
	B. Staff plan with roles and responsibilities;
	C. Key performance metrics
	D. Proposed service level agreements (SLAs);
	E. Approach for managing and reporting metrics and SLAs; and
	F. Assumptions.
DELIVERABLE 10 – MOBILE APP GENERAL AND TECHNICAL SYSTEMS DESIGN	THE CONTRACTOR SHALL PROVIDE THE GENERAL AND TECHNICAL SYSTEMS DESIGN, WHICH WILL CONTAIN AND ADDRESS THE FOLLOWING:
	A. Methodology and Assumptions;
	B. Mock Application Page Layouts including navigation;
	C. Storyboards, wireframes and prototypes as applicable;
	D. Reports and Dashboard Layouts;
	E. Logical Data model(s);

STATEWIDE PORTAL/MOBILE APP DELIVERABLES	
	F. SAWS Interface specifications;
	G. Business Rules;
	H. Technical Architecture specifications;
	I. System components and entity relationship diagrams;
	J. Network topology diagrams, including Cloud computing environment;
	K. Information Security design (application and network security protocols);
	L. Application architecture design (software layers);
	M. Webservice/application programming interface (API) design;
	N. Physical Data Model;
	O. Physical and logical directory path locations; and
	P. Format library specification, and update tools.
DELIVERABLE 11 – MOBILE APP IMPLEMENTATION COMPLETE REPORT	THE CONTRACTOR SHALL PROVIDE AN IMPLEMENTATION COMPLETE REPORT WHICH CERTIFIES THAT ALL MOBILE APP REQUIREMENTS HAVE BEEN MET AND THAT ALL KNOWN DEFICIENCIES HAVE BEEN CORRECTED.

1.7 STAFFING REQUIREMENTS

The Portal/Mobile App Contractor is responsible for providing all Staff necessary to fulfill the Portal/Mobile App Services requirements defined in this RFP.

The Portal/Mobile App Contractor is responsible for employing an approach for Staff management that facilitates a productive working relationship with Consortium and county staff, DD&I Contractor staff, stakeholder, advocate and client staff and progresses towards task completion. In order to facilitate Project progress, it is important to the Consortium that the Portal/Mobile App Contractor minimizes staff turnover to the extent possible, particularly for Key Staff as detailed below.

- The Portal/Mobile App Contractor is responsible for ensuring all Portal/Mobile App Contractor staff clearly understand both initial and ongoing roles and responsibilities, and how the team and assignments relate to the Portal/Mobile App DD&I effort as well as the overall CalSAWS Migration Project plan.
- The Portal/Mobile App Contractor Staff approach must address and demonstrate the following requirements:

- All proposed Contractor staff must have good oral and written communication skills. One aspect of good oral communication skills includes the ability to communicate with diverse groups of users as part of the UCD process and to convey IT terms and concepts to non-technical audiences.
- All Contractor Project staff must be eligible to work in the State of California.
- All Contractor staff are expected to actively participate in designated Project meetings and represent the best interests of the Consortium, identify and escalate issues as appropriate, and contribute to required weekly and monthly status reports.
- All Portal/Mobile App Key Staff positions, including minimum qualifications, are described in the subsections below. Contractor must use ***Attachment G – Staff Resumes/Qualifications*** for each proposed Key Staff. Contractors must use ***Attachment I – Additional Application Support Role Definition*** to define any proposed non-key roles and minimum qualifications.

1.7.1 Portal/Mobile App Key Staff

The Statewide Portal/Mobile App Key Staff positions include:

- Project Manager
- Application Development Lead
- Test Lead
- User Interface Lead

1.7.1.1 Portal/Mobile App Project Manager

The Portal/Mobile App Contractor Project Manager is responsible for managing the Portal/Mobile App scope of services, their team and administering the Portal/Mobile App Contractor Agreement. The Project Manager is responsible for ensuring the Portal/Mobile App Project receives company support, commitment, and oversight to meet or exceed all its contractual requirements. The Project Manager must have the decision-making authority to bind the Portal/Mobile App Contractor contractually to all terms and conditions in the Agreement. The Project Manager is accountable for Portal/Mobile App Contractor Staff performance.

In addition to the above, the Project Manager responsibilities shall include, but not be limited to, the following:

- Ensuring the Portal/Mobile App Contractor team understands the scope of the Agreement and the Portal/Mobile App Project role in the “big picture” of the Migration Project, including how to work in concert with the Consortium, Counties, state, stakeholders, advocates, clients and other Contractors.

- Overseeing the development and delivery of all Portal/Mobile App Contractor Deliverables, tasks and services and ensuring they are of the highest quality and are delivered in accordance with the approved Portal/Mobile App work plan.
- Participating in ongoing communications and status updates to the CalSAWS Board of Directors, Project Steering Committee (PSC), State and Federal Stakeholders as directed by the Executive Director.

The Portal/Mobile App Project Manager shall have at least the Minimum Qualifications defined in the following table:

Table 2 – Portal/Mobile App Project Manager Qualifications

EXPERIENCE	MINIMUM
A minimum of five (5) years of experience managing an IT Project using a defined system development life cycle (SDLC), including business and system requirement specifications, design, development, testing, and implementation.	5 Years
A PMI PMP Certification.	Desirable
A minimum of five (5) years of experience leading the development of Deliverables on IT Projects.	5 Years
A minimum of five (5) years of experience managing a team of 5 or more people.	5 Years

1.7.1.2 Application Development Lead

The Application Development Lead is responsible for the overall design and development of the Portal/Mobile Application. The Application Development Lead will monitor and coordinate technical support activities including defining the hardware services and software configuration, defining the programming and testing environments and developing the performance model.

In addition to the above, the Application Lead's responsibilities shall include, but not be limited to, the following:

- Provide technical direction for development, design, and integration of the Portal/Mobile App.
- Participate in the development of user engagement to ensure technical deliverables meet the needs of users.
- Lead the development of all technical design and development Deliverables.
- Plan, prepare for and manage all technical development tasks and resources in accordance with the approved Portal/Mobile App work plan.
- Work closely with a variety of teams to assess, advise, plan, design, build and implement a cloud services solution.
- Engage with current SAWS vendors in communication and coordination of the infrastructure hosting and operations support functions.

- Coordinate with other vendors in making modifications to the current LRS, C-IV, and CalWIN systems to integrate and interface with the Portal/Mobile App technical infrastructure.
- Analyze the technical business needs and requirements to ensure Portal/Mobile App infrastructure is designed to support SAWS integration and ongoing operations.
- Document and maintain detailed design and configuration documentation/diagrams for infrastructure storage, compute, virtualization, network and security.
- Maintain and monitor cloud performance and recommend optimization alternatives within the infrastructure for ongoing performance improvements, capacity management and cost efficiencies.
- Perform risk analysis to identify security issues and remediating plans. Identify and/or mitigate operational risks where appropriate.

The Portal/Mobile Application Development Lead shall have at least the Minimum Qualifications defined in the following table:

Table 3 – Portal/Mobile Application Development Lead Qualifications

EXPERIENCE	MINIMUM
A minimum of seven (7) years of experience in the development, implementation and management of information technology infrastructure and IT systems, including cloud architectures, business systems, server technologies, and communication technologies.	7 Years
A Bachelor's Degree in Information Systems and/or similar Technical Degree and/or four (4) years of demonstrated experience in infrastructure operations development and management, including the development and implementation of telecommunication systems, networks, and webservice interfaces.	4 Years

1.7.1.3 Test Lead

The Portal/Mobile App Test Lead is responsible for planning, preparing for and executing all system test, regression test and UAT tasks, Deliverables, resources and environments. The Test Lead is responsible for training and working collaboratively with Consortium, county, stakeholder, advocate and client staff participating in the UAT effort.

In addition to the above, the Test Lead's responsibilities shall include, but not be limited to, the following:

- Lead the development of all test related Deliverables.
- Plan, prepare for and manage all test tasks and resources in accordance with the approved Portal/Mobile App Work Plan and Master Test Plan.
- Coordinate all system test and UAT environment builds, modifications and deployments.

- Train UAT testers on the concept of UAT, how to work in accordance with the UAT Plan, how to develop and execute UAT scripts, how to conduct unscripted testing, how to document test results and deficiencies in the appropriate tools and retest requirements once deficiencies are corrected.
- Document and track all requirements met through the system test and UAT tasks.
- Provide recommendations to the Consortium regarding the feasibility of promoting the application into the production environment based on system, UAT and regression test results and exit criteria.

The Portal/Mobile App Test Lead shall have at least the Minimum Qualifications defined in the following table:

Table 4 – Portal/Mobile Test Lead Qualifications

EXPERIENCE	MINIMUM
A minimum of two (2) years of experience in a test leadership role for a Project with over 1,000 concurrent users.	2 Years
A minimum of five (5) years of experience planning, preparing for and executing system test, UAT and/or regression tests in compliance with a recognized standard, such as IEEE or ISO.	5 Years
A minimum of three (3) years of experience with Health and Human Services systems Projects.	3 Years

1.7.1.4 User Interface Lead

The User Interface (UI) Lead is responsible for working closely with the design, development and test teams in support of Consortium, county, state, advocate and client activities. The UI Lead will coordinate with these groups to identify, research and resolve questions, and communicate insights to shape the user experiences. The UI Lead will engage the Consortium, counties, state, advocates and clients in UCD activities throughout the design and development processes and will oversee the design and usability of the Portal/Mobile application. The UI Lead will identify and proactively bring forward options that will provide the most efficient and effective engagement of users, and the best value to the Consortium, Counties, and stakeholders. In addition, the UI Lead will:

- Gather consumer and user business data.
- Interview users to reveals areas of opportunity and pain points.
- Facilitate requirements, design and other sessions as appropriate with various user and stakeholder groups.
- Synthesize UX test and interviews and capture qualitative and quantitative data.
- Convey findings to stakeholders and the design team in order to guide design, development and implementation strategies.

The User Interface Lead shall have at least the Minimum Qualifications defined in the following table:

Table 5 – Portal/Mobile User Interface Lead Qualifications

EXPERIENCE	MINIMUM
A minimum of three (3) years of customer experience, insights and/or strategy in human services systems and/or programs.	3 Years
A minimum of three (3) years of experience gathering consumer and user business data, analyzing of the data, to quantify and inform User Interface/User Experience (UI/UX) strategies.	3 Years
A minimum of three (3) years of experience applying UI/UX Design, implementing UI/UX methodologies and best practices, and designing wireframes or prototypes for research validation.	3 Years

1.7.2 Project Location and Core Hours

The Portal/Mobile App Contractor’s staff shall be dedicated to the Portal/Mobile App Project unless otherwise described within the Portal/Mobile App Contractor’s approach and approved by the Executive Director. Work must be conducted at an approved Project site as described in Section 1.5, unless alternate arrangements are approved in writing by the Executive Director. The Project hours are based on a 5-day, 40-hour work week, beginning 12 PM PST on Monday and ending 12 PM PST on Friday, with 10-hour workdays Tuesday through Thursday.

1.7.3 Statewide Portal/Mobile App Contractor Staff Changes

For any expected Portal/Mobile App staff changes, the Portal/Mobile App Contractor shall provide a 30-calendar day notice to the Executive Director regarding the change and plans for transition. The Portal/Mobile App Contractor shall provide the Consortium a resume and three references for any recommended replacement staff. The Consortium reserves the right to require face-to-face or phone interviews of all proposed replacement staff. The Consortium reserves the right to accept or reject any proposed staff.

For any unexpected staff changes, the Portal/Mobile App Contractor shall provide the Consortium Executive Director a written notification within three business days of knowledge and staff action. Within seven (7) calendar days of providing such written notice, the Portal/Mobile App Contractor shall provide the Consortium Executive Director with plans for transition.

1.7.4 Staff Performance

The Portal/Mobile App Contractor shall be responsible for identifying and correcting performance issues for its entire staff (i.e. employees and Subcontractors). Should the Consortium discover performance problems with any Portal/Mobile App Contractor staff, the Executive Director will notify the Portal/Mobile App Project Manager as soon as is reasonably possible. If the Executive Director requests removal of any Portal/Mobile App staff person, the Portal/Mobile App Contractor shall immediately remove such staff from the Project.