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# SECTION 1 – INTRODUCTION

This schedule identifies the anticipated requirements of any Contract resulting from this RFP. As used during the solicitation phase, the term “Vendor” in this document refers to a Respondent to the RFP.

**The Vendor must respond to each requirement or question and explain how it will fulfill each requirement. Attach any supplemental information and appropriately reference within your response.**

1. **Purpose and Goals**

The Children’s Services Council of Leon County (“CSC Leon”) seeks an integrated information system to manage specific functions efficiently and maximize data analysis capabilities. Specifically, CSC Leon seeks to:

1. Develop a grant making and contract management system with a comprehensive solution for supporting programmatic functions, including performance measurement and reporting,

2. Integrate with the current CSC Leon accounting software (Bill.com),

3. Introduce an integrated customer relationship management (CRM) solution to enhance community engagement efforts, and

4. Work with existing community partner database systems to develop data sharing agreements and processes to better serve clients.

Specifically, CSC Leon is seeking a Vendor Hosted Software Solution and applicable services, utilizing Commercial-Off-the-Shelf Software (COTS) with customizations as needed. CSC Leon is not seeking a fully custom designed system. A primary purpose is to upgrade CSC Leon’s current technology environment as described below, and to support future growth of the organization.

CSC Leon’s goals are to:

1. Acquire a solution that supports CSC Leon’s immediate plans for information systems integration and near-term plans for electronic data exchange with external stakeholders.

2. Acquire a platform that will allow CSC Leon to collect aggregated program-level data and eventually include the collection of individual client-level data.

3. Integrate specific business processes/systems and eliminate manual/redundant entry of information.

4. Acquire and implement a software solution that meets CSC Leon’s needs using as much COTS functionality as possible.

5. Support the current business process needs of the primary functions within the organization, updating software system functionality, where needed.

6. Establish the foundation for future reporting, analysis and budgeting needs.

7. Ensure all stakeholder classes have ready access to accurate and timely information to improve operational productivity and customer service.

8. Enhance functionality to provide more efficient and effective reporting in specific areas of the business.

9. Implement a stable and inter-connected set of systems capable of accommodating both internal stakeholder and external stakeholder needs.

10. Acquire a well-supported system from a reliable Vendor with adequate resources to support, upgrade, and maintain the package over the long-term.

11. Acquire a system with robust architecture that has capability to effectively and efficiently integrate with other vendor solutions.

12. Partner with a Vendor that can architect and provide a flexible and phased implementation approach.

13. Improve stakeholder collaboration and build good inter-department processes, (e.g., task flow management).

14. Either strategically migrate or archive the historic record of transactions currently maintained in multiple applications serving as systems of record.

1. **Business Modules**

CSC Leon believes the goals stipulated above can be made by the integrated deployment of the following three software modules into a single solution:

1. *Grant Making & Contract Management*
2. Design and publish competitive procurements and community funding opportunities (grants)
3. Management of application process by external stakeholders with the ability to “save as you go” and flexible budget templates
4. Task management (workflows) and decision support for application review and scoring by internal and external stakeholders
5. Contract award, signature and execution
6. Contract and fund management
7. Integrate with other modules
8. *Performance Measurement and Information Management*
   1. Robust data management tool to collect, organize, analyze and display specific services and activities by multiple external stakeholders including:
      1. Programmatic data (demographics, attendance, process measures, etc.)
      2. Fiscal activity reporting and tracking (budgets, expenditures, staffing, etc.)
      3. Performance indicators (impact measurement tools, etc.) including change over time
   2. Ability to build intelligent processes to acquire third-party, publicly available data and integrate into display and comparison functions over time (e.g., U.S. Census Bureau, Florida Department of Health, etc.)
   3. Ability to analyze data and easily create visualization of service distribution by type, zip code, and other filters
   4. Integrate with other modules
9. *Customer Relationship Management*
10. Store contact and demographic details for a multitude of stakeholders including community investment partners, applicants, volunteers, general interest, media, council members, funders, donors, etc.
11. Record requests for information, technical assistance, training, etc. with ability to assign tasks and track follow-up
12. Design and publish sign ups/registration and track participation/attendance with the ability to issue certificates post event/training
13. Design and publish community outreach campaigns
14. Integrate with other modules
15. **Current Technology Environment**
16. *Office Location & Description*

CSC Leon has one location in Tallahassee, Florida, which includes both office and meeting space for 7 staff members and a 10-member council along with a family resource room and training facility. The onsite meeting and training facility is well-equipped with multiple smart screens, the ability to live stream and simulcast, and an IP-based system in place for visitors to connect devices.

1. *Current Software Solutions*
   1. CSC Leon maintains a Microsoft Office 365 G3 subscription for all internal users. This license includes Word, Outlook, Excel, PowerPoint, OneNote, and Access. CSC Leon also has a single Power BI license and 10 Microsoft Office 356 G1 (Outlook only) subscriptions for its council members.
   2. CSC Leon currently utilizes Share Point under its Microsoft 365 G3 subscription in lieu of a business server.
   3. CSC Leon currently uses a combination of cloud-based survey tools (e.g., Survey Monkey, Google Forms, etc.) and Office 356 applications for grant application completion, reporting and data storage. CSC Leon currently has 5 internal users and 29 external users at outside agencies operating 30 individual programs.
   4. CSC Leon contracts with an outside CPA, Grayson Accounting & Consulting, P.A., who uses cloud-based QuickBooks to manage most of the finance and accounting operations.
   5. CSC Leon uses Bill.com and Paychex for its remaining accounting functions. It maintains 3 user licenses for each currently.
   6. CSC Leon uses Wordpress to maintain a basic website that includes a single lead generation widget for Send in Blue. To date, CSC Leon has not fully deployed Send in Blue for the purposes of a customer relations management tool nor for marketing or communications. We currently maintain an active list of approximately 300 contacts. We anticipate this to grow substantially.
2. *Hardware and Connectivity*
   1. CSC Leon currently has 4 laptop computers, 2 networked Toshiba MFP copier/scanner/fax machines and 2 networked HP color laser printers that are used by its staff members for daily operations.
   2. A hardwired firewall is in use between the local network and the internet. Both an internal wireless network and a guest wireless network are available.
   3. CSC Leon’s Internet connection will be provided by Comcast – Business Internet Bundle 300 MB download with 5 static IPs, 1 voice line, and basic cable tv. A VOIP phone system will be in use.
3. *Managed Services*
   1. CSC Leon does not currently contract with a managed service provider but is exploring local options for IT support.
4. *External Stakeholders*
   1. All external agencies that apply for funding from CSC Leon will be expected to use several elements of the newly developed modules or system applications. Currently, approximately 60 agencies have previously applied for funding. Out of those applicants, 28 agencies received funding. The number of new agencies applying for funding is expected to increase each year.
   2. Agencies request funding for the services offered to the community, which are referred to as “programs.” Of the 28 agencies that received funding thus far, there are 30 programs. Most times, an agency will run a single program. There are agencies that run multiple programs. There are a few programs that are managed by multiple agencies; in these instances, CSC Leon will provide funding to a designated primary agency. Each of the agencies has varying access to current technology and each possesses varying degrees of technological capacity (operating knowledge). Many agencies are small non-profits with limited technical infrastructure and abilities.
5. *Future Software Solutions*
   1. CSC Leon desires to work with existing community partner database systems to develop data sharing agreements and processes to better serve clients. While this explicit function is not covered in the parameters of this specific RFP, CSC Leon desires to select a vendor that is open to developing these relationships and providing cost-effective integration services in the future. These partners and their respective systems include:
      1. 2-1-1 of the Big Bend (Well Sky)
      2. Leon County Sheriff’s Office (SPIRIT)
      3. Leon County and City of Tallahassee Community Human Services Partnership
      4. Capital Area Healthy Start Coalition (Healthy Start Monitoring and Evaluation Data System)
      5. Early Learning Coalition of the Big Bend (WELS)
      6. Leon County Schools (multiple)

# SECTION 2 – VENDOR IT ENVIRONMENT RESPONSIBILITIES

To be effective, the technological infrastructure, policies, and practices deployed by the Vendor and its associated solution(s) must meet specific criteria.

1. **Vendor Hosted**

|  |
| --- |
| Confirm that the proposal is for a Vendor Hosted solution.  **Response:** |

1. **Data Security, Retention and Removal**

The data collected and stored in the solution may contain sensitive information and therefore require specific data security measures.

|  |
| --- |
| Describe how identified components will maintain compliance with requirements in the **SCHEDULE E - Data Security Requirements**.  **Response:** |
| With reference to Rule 60GG-2.003, explain how Respondent will meet the requirements for Access Control and Authentication.  **Response:** |

1. **Data Retention and Removal**

CSC Leon will need to retain all data beyond the length of the Contract unless otherwise directed by CSC Leon. It may need the ability to delete data, even data that may be stored off-line or in backups. More importantly, CSC Leon will need to the ability to retrieve data, even data that may be stored off-line or in backups.

|  |
| --- |
| Explain how the data retention, deletion and retrieval requirements will be met and describe data management capabilities (storage limitations, duration, etc.).  **Response:** |
| Explain how Vendor will be able to support the current and future growth of the proposed solution’s data capacity.  **Response**: |

1. **Disaster Recovery Plan**

|  |
| --- |
| **SCHEDULE F – Disaster Recovery Plan;** Vendor must provide CSC Leon with a detailed Disaster Recovery Plan that details how the following minimum data security areas will be handled.   * Back-up and Recovery:   1. Organization policy and procedures authorizing this activity.   2. The roles and responsibilities within the organization and the integration of activities with any affiliated organizations also responsible for back-up and recovery.   3. Training and awareness of staff and contracted employees.   4. The most recent back up/fail-over test date at the time of submission.   5. Priority for the recovery and reconstitution of activities. * Incident Handling:   1. Organization policy and procedures authorizing this activity and covering the areas of preparation, detection and analysis, containment, eradication, reporting and recovery.   2. Roles and responsibilities with the organization and affiliated organizations.   3. Training and awareness of staff and contracted employees.   4. Description of the implementation of secure communications such as a description of software tool(s) used for tracking and documenting the incident or disaster. * Disaster Recovery Planning:  1. Identification of the organization’s business functions, recovery objectives, restoration priorities, and metrics of evaluation. 2. Organization policy and procedures authorizing this activity and covers the areas of preparation, detection and analysis, containment, eradication, and recovery. 3. Roles and responsibilities with the organization and affiliated organizations. 4. Training and awareness practices of staff and contracted employees. 5. The most recent disaster recovery/contingency plan test date at time of submission. 6. Methods used to identify deficiencies and corrective actions from the most recent disaster/contingency plan test and the status of corrective actions. 7. Description of the implementation of secure communications such as a description of software tool(s) used for tracking and documenting the incident or disaster. 8. Identification and use of alternate storage and process sites for business continuity. 9. Protections and recovery planning for ransomware attacks.   **Response:**  Submit the above supporting documentation with the Proposal. If considered “trade secret” or otherwise confidential, label accordingly. |

1. **Component Matrix**

|  |
| --- |
| Describe each of the components maintained by the Vendor in its IT environment that would be specifically utilized to support the proposed solution(s). |

|  |  |
| --- | --- |
| **Facilities** – Physical buildings containing Infrastructure and supporting services, including physical access security, power connectivity and generators, HVAC systems, communications connectivity access and safety systems such as fire suppression. | **Response:** |
| **Infrastructure** – Hardware, firmware, software, and networks, provided to develop, test, deliver, monitor, manage, and support IT services which are not included under Platform and Application. | **Response:** |
| **Platform** – Computing server software components including operating system (OS), middleware (e.g., Java runtime, .NET runtime, integration, etc.), database and other services to host applications. | **Response:** |
| **Application** – Software programs which provide functionality for end user and Vendor services. | **Response:** |
| **Storage** – Physical data storage devices, usually implemented using virtual partitioning, which store software and data for IT system operations. | **Response:** |
| **Backup** – Storage and services that provide online and offline redundant copies of software and data. | **Response:** |
| **Development** - Process of creating, testing and maintaining software components. | **Response:** |
| Identify any subcontractor(s) used for the components in the table above. Provide additional information if the table above does not adequately identify the division of responsibilities.  **Response:** | |

# SECTION 3 – ADA COMPLIANCE

All websites, applications, software, and associated content and documentation provided by the Vendor as part of the Solution must comply with Level AA of the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.0.

|  |
| --- |
| Provide a description of conformance with WCAG 2.0 Level AA specifications by providing a completed Product Accessibility Template (PAT) for the Solution. If the Solution is comprised of multiple products, provide a PAT for each product (or verification of conformance certified by an industry-recognized third-party). If including any third-party products in the Solution, obtain and provide the third-party PATs as well.  Each PAT must state exactly how the product meets the specifications. Explain fully any “Not Applicable” (N/A) responses. Address each standard individually and with specificity. Clarify whether conformance is achieved throughout the entire product (for example – user functionality, administrator functionality, and reporting), or only in limited areas. Describe the evaluation methods used to support WCAG 2.0 Level AA conformance claims, including, if applicable, any third-party testing.  For each product that does not fully conform to WCAG 2.0 Level AA, provide detailed information regarding the plan to achieve conformance, including timelines. Provide details of how they will meet these requirements.  **Response:** |

# SECTION 4 – USER TYPE AND CAPACITY

The proposed solution(s) must be able to support the number of concurrent users as defined below, and the ability to restrict access permissions by user and report type. Solution must meet the expected number of concurrent Users.

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of User** | **Access Type** | **Number of Users** | **Number of Concurrent Users** |
| Applicant | Read and write | Unlimited | Unknown |
| Grantee | Read, write, and edit | 60 | 60 |
| Reviewer | Read and write | 20 | 20 |
| Evaluator | Read, write, and edit | 8 | 5 |
| Staff | Read, write, edit, assign users, assign controls | 10 | 5 |
| Administrator | Full administrative rights | 3 | 2 |

1. **Concurrent Users**

|  |
| --- |
| Explain how the solution will be able to support the expected number of concurrent users. Explain whether the solution can scale up or down without affecting performance.  **Response:** |

1. **Latency**

|  |
| --- |
| Provide details regarding latency response time (e.g., Generate Page Load, standardized reporting, ad hoc reporting). Identify what network connectivity or equipment will CSC Leon be required to have to meet the expected latency response time.  **Response:** |

# SECTION 5 – END USER AND CLIENT OPERATING ENVIRONMENT

The Vendor must accommodate the latest browser versions (including mobile browsers) as well as some pre-existing browsers. To ensure that users with older browsers are still able to access online services, applications must, at a minimum, display and function correctly in standards-compliant browsers without the use of special plugins or extensions.

1. **Optimal Environment**

|  |
| --- |
| Describe the optimal IT environment based on the environment choices set forth above.  **Response:** |

1. **System Access**

|  |
| --- |
| Describe any CSC Leon system access requirements that are necessary for Vendor to perform its obligations on a timely basis, including but not limited to, physical or remote access to CSC Leon networks, servers, or individual workstations.  **Response:** |

1. **Use of Plug-Ins**

|  |
| --- |
| Identify any plug-ins necessary for the proposed solution(s) to meet the system requirements of this request.  **Response:** |

1. **Mobile Responsiveness**

|  |
| --- |
| Describe the level of responsive design practices deployed by the Vendor to maximize use of the proposed solution across devices.  **Response:** |

1. **Change Communications**

|  |
| --- |
| Describe how Vendor communicates changes to its software and architecture.  **Response:** |

1. **Collaborative Decision-Making**

|  |
| --- |
| Describe how customers collaborate with Vendor in the decision-making process for upgrades, maintenance, and change control.  **Response:** |

# SECTION 6 – BUSINESS MODULES

The proposal must include an integrated solution for the specific business functions identified in Section 1.B.

1. **Grant Making & Contract Management**

|  |
| --- |
| Describe in detail the proposed solution(s), including, but not limited to, a description of the Software (name, type, version, release number, etc.), its functionality including the information architecture and functional design of the system, such as functionality maps, architectural maps, training materials, visual aids including screen shots, actions performed by the system, and any behind the scenes processing, optional add-on modules and plugins.  The level of detail provided should be such so that anyone is able to read it and understand how the software works.  Clearly define the Vendor’s services and the solution’s ability to be rapidly configured or scaled as CSC Leon’s business or technical demands change.  **Response:** |

1. **Performance Measurement and Information Management**

|  |
| --- |
| Describe in detail the proposed solution(s), including, but not limited to, a description of the Software (name, type, version, release number, etc.), its functionality including the information architecture and functional design of the system, such as functionality maps, architectural maps, training materials, visual aids including screen shots, actions performed by the system, and any behind the scenes processing, optional add-on modules and plugins.  The level of detail provided should be such so that anyone is able to read it and understand how the software works.  Clearly define the Vendor’s services and the solution’s ability to be rapidly configured or scaled as CSC Leon’s business or technical demands change.  **Response:** |

1. **Customer Relationship Management**

|  |
| --- |
| Describe in detail the proposed solution(s), including, but not limited to, a description of the Software (name, type, version, release number, etc.), its functionality including the information architecture and functional design of the system, such as functionality maps, architectural maps, training materials, visual aids including screen shots, actions performed by the system, and any behind the scenes processing, optional add-on modules and plugins.  The level of detail provided should be such so that anyone is able to read it and understand how the software works.  Clearly define the Vendor’s services and the solution’s ability to be rapidly configured or scaled as CSC Leon’s business or technical demands change.  **Response:** |

1. **Unique Software Requirements**

|  |
| --- |
| Identify any unique software requirements to fulfill the terms of the Contract.  **Response:** |

1. **Unique System Requirements**

|  |
| --- |
| Describe any unique system access requirements that are necessary for Vendor to perform its obligations on a timely basis, including but not limited to, physical or remote access to CSC Leon networks, servers, or individual workstations.  **Response:** |

1. **Licensing Structure**

|  |
| --- |
| Describe the licensing structure for each software title required to fulfill the terms of the Contract.  **Response:** |

1. **Third Party Components**

|  |
| --- |
| Identify any third-party components, including open-source components included with or used in connection with the proposed solution.  **Response:** |

1. **Mobile Responsiveness**

|  |
| --- |
| Provide list of features that can be performed via a mobile device, identifying, if applicable, which mobile browsers are compatible.  **Response:** |

1. **Additional Products and Services**

|  |
| --- |
| Describe additional solution functionality, products or services that the CSC Leon specifications do not address but are necessary to implement and support this solution.  **Response:** |

# SECTION 7 – INTEGRATION SERVICES

The proposal must include specific details on how each business module integrates with each other business module, existing software, and the Vendor’s approach to managing integration services, including legacy data migration.

1. **Proposed Business Modules**

|  |
| --- |
| Explain how the proposed solution(s) will integrate the required business modules to each other. Include the proposed architectural map between modules.  **Response:** |

1. **BILL.COM**

|  |  |
| --- | --- |
| Current Technology | BILL.COM |
| Current Business Function | Accounts payable |
| Desired Business Integration | Task flow Management |
| Volume of Data | Approximately 15 months of weekly, monthly and one-time transactions |
| Format of the input & export files | Raw data (.CSV, .XLS) |
| Explain how the proposed solution(s) will integrate to this existing thirty-party solution.  **Response:** | |
| Explain in detail how and what services are required to migrate the data from the current technology.  **Response:** | |

1. **Microsoft Office 365**

|  |  |
| --- | --- |
| Current Technology | MS Office including Outlook, Word, Excel, Powerpoint, Planner |
| Business Function | Basic office management, email communication, data processing, storage, task flow management |
| Desired Business Integration | Customer interaction tracking, specifically for help requests, deliverables, applications, etc. |
| Volume of Data | 18 months of email data, attachments, files, presentations, etc. |
| Format of the input & export files | Varies |
| Explain how the proposed solution(s) will integrate to this existing thirty-party solution.  **Response:** | |
| Explain in detail how and what services are required to migrate the data from the current technology.  **Response:** | |

1. **Wordpress**

|  |  |
| --- | --- |
| Current Technology | Wordpress |
| Business Function | Public facing web presence used to communicate announcements, job postings, procurement opportunities, and public information repository |
| Desired Business Integration | Customer interaction portal access for applications, trainings, newsletters, public information, etc. |
| Volume of Data | 18 months of meeting information, press and procurement announcements |
| Format of the input & export files | Primarily PDF, text and image-based files |
| Explain how the proposed solution(s) will integrate to this existing thirty-party solution.  **Response:** | |
| Explain in detail how and what services are required to migrate the data from the current technology.  **Response:** | |

1. **General Integration Services**

|  |
| --- |
| Explain how Vendor will be able to support CSC Leon’s future goals of the proposed solution’s ability to integrate with other third-party systems. Include descriptions of relevant experience. Provide the cost for such services in the price sheet.  **Response:** |

# SECTION 8 – TRAINING SERVICES

Vendor must provide administration and end-user training for implementation, go-live support, and transition to User self‐sufficiency.

|  |
| --- |
| Describe available training options and include details such as: typical class size, materials to be provided, class duration, on-site or web based. Provide a training plan for go-live support and transition to self-support, including options and details such as the number of dedicated personnel, staff location, hours available and duration of go-live support.  **Response:** |
| Provide details on, and examples of, clearly written instructions and documentation to enable CSC Leon administrators and end Users to successfully operate the Solution without needing to bring in additional Vendor support.  **Response:** |

# SECTION 9 – DOCUMENTATION

Vendor must provide all user manuals, operating manuals, technical manuals and any other instructions, specifications, documents or materials, in any form or media, that describe the functionality, installation, testing, operation, use, maintenance, support, technical or other components, features or requirements of the Software.

Vendor must develop and submit for CSC Leon approval complete, accurate, and timely Solution documentation to support all Users, and must update any discrepancies, or errors through the life of the Contract.

Vendor’s user documentation must provide detailed information about all software features and functionality, enabling CSC Leon to resolve common questions and issues prior to initiating formal support requests.

|  |
| --- |
| Provide details on, and examples of, documentation to meet the requirements set forth in this section.  **Response:** |

# SECTION 10 – VENDOR PERSONNEL

CSC Leon recognizes that a strong implementation team is critical to the success of this Contract. Please complete each section in its entirety and include an organizational chart identifying, at minimum, all listed team members.

1. **Contract Administrator**

|  |
| --- |
| Please identify the individual who is responsible to (a) administer the terms of this Contract, and (b) approve and execute any Change Notices under this Contract.  **Name:**  **Address:**  **Phone:**  **Email:** |

1. **Key Personnel**

The Vendor’s Project Manager, Implementation Leader, and Security Officer are designated as Key Personnel. Provide the names, contact details and resumes for these positions.

|  |
| --- |
| **Vendor Project Manager.** Vendor resource who serves as the primary contact with regard to all services and has authority to act on behalf of the Vendor in matters pertaining to the implementation and technical assistance services.  **Name:**  **Address:**  **Phone:**  **Email:** |
| **Vendor Implementation Leader.** Vendor resource who serves as the primary contact with regard to technical implementation services. This individual will gain advanced knowledge of CSC Leon’s business needs in order to facilitate the development, customization, and/or configuration of necessary components to implement a fully conforming and robust solution(s).  **Name:**  **Address:**  **Phone:**  **Email:** |
| **Vendor Security Officer.** Vendor resource who is responsible to respond to CSC Leon inquiries regarding the security of the Vendor’s solution(s). This individual must have sufficient knowledge of the security of the solution(s) and the authority to act on behalf of Vendor in security matters.  **Name:**  **Address:**  **Phone:**  **Email:** |

1. **Other Personnel**

|  |
| --- |
| In addition to the Key Personnel roles, the Vendor’s implementation team must possess sufficient skills, experience, and availability to successfully implement the Solution. Using the table below as a guide, describe the roles, responsibilities, and the skillsets of the team that will implement the solution. Provide names in third column and include resumes in sufficient detail to demonstrate capability to develop and implement a successful solution. |

|  |  |  |
| --- | --- | --- |
| **Classification** | **Responsibility/Skill Set** | **Name/Years of Experience/ Applicable Experience** |
| **Business Analyst** | Under the direction of the Implementation Leader will participate in analysis and discovery activities. |  |
| **Data Architect** | Provides data base architecture, design, and overall data-related solutioning. Provides data mapping for migration |  |
| **Technology Related Developers** | Under the direction of the Implementation Leader will develop the Solution |  |
| **Testing Personnel** | Develops test plans, test cases and manages and performs testing activities. |  |
| **Training Technical Lead** | Develops and delivers training materials and conducts training sessions. |  |
| **User Interface and User Experience (UI/UX) Specialist** | Ensures that vendor’s solution meets CSC Leon’s web standards for look-and-feel and accessibility. |  |
| **Customer Success Specialist** | Responds to queries and requests for technical assistance in a timely and supportive manner |  |

1. **Background Checks**

Upon contract award, Vendor must present certifications evidencing satisfactory background checks for all staff identified for assignment to this project. Vendor will pay for all costs associated with ensuring its staff meets all requirements.

# SECTION 11 – DISCLOSURE OF SUBCONTRACTORS

If the Vendor intends to utilize subcontractors, the Vendor must disclose the following:

* The legal business name; address; telephone number; a description of subcontractor’s organization and the services it will provide; and information concerning subcontractor’s ability to provide the Contract Activities.
* The relationship of the subcontractor to the Vendor.
* Whether the Vendor has a previous working experience with the subcontractor. If yes, provide details of that previous relationship.
* A complete description of the Contract activities that will be performed or provided by the subcontractor.
* CSC Leon strongly supports and encourages diversity and participation of historically disadvantaged business enterprises in contracting, as evidenced in the CSC Leon Purchasing Policy. Attach any evidence of firm certification by the *Minority, Women, and Small Business Enterprise Division of the Office of Economic Vitality* or comparable public body and identify the qualifying individuals. Non-certified firms may highlight individual investments, e.g., the number and percentage of professionals who are minorities or women**.**

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| **Confirm review of the above requirements by completing the table below (use “none” where appropriate).** | |
| **The legal business name, address, telephone number of the subcontractor(s).** | **Response:** |
| **A description of subcontractor’s organization and the services it will provide and information concerning subcontractor’s ability to provide the Contract activities.** | **Response:** |
| **The relationship of the subcontractor to Vendor.** | **Response:** |
| **Whether Vendor has a previous working experience with the subcontractor.  If yes, provide the details of that previous relationship.** | **Response:** |
| **A complete description of the Contract activities that will be performed or provided by the subcontractor.** | **Response:** |
| **Of the total bid, the price of the subcontractor’s work.** | **Response:** |
| **Minority, Women, and Small Business Enterprise details.** | **Response:** |

# SECTION 12 – CSC LEON RESOURCES/RESPONSIBILITIES

CSC Leon will provide the following resources as part of the implementation and ongoing support of the Solution.

**CSC Leon** **Contract Administrator**. The CSC Leon Contract Administrator will (a) administer the terms of this Contract, and (b) approve and execute any Change Notices under this Contract.

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| **CSC Leon Contract Administrator** |
| **Name: Dina Snider Email:** [**dsnider@cscleon.org**](mailto:dsnider@cscleon.org) |

**CSC Leon Project Manager**. The CSC Leon Project Manager will approve all Deliverables and day-to-day activities.

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| **CSC Leon Project Manager** |
| **Name: Holly McPhail Email:** [**hmcphail@cscleon.org**](mailto:hmcphail@cscleon.org) |

# SECTION 13 – PROJECT MANAGEMENT

1. **Methodology**

CSC Leon is requesting an implementation approach that closely aligns with Agile Scrum Methodology and includes comparable artifacts and ceremonies that are properly implemented. An approach with iterative build and review cycles and core team involvement are more likely to meet CSC Leon’s expectations and will provide greater overall project success. The State of Florida has invested significant effort in developing project management resources, which CSC Leon deems are suitable for this project, and which are available at: <https://www.dms.myflorida.com/other_programs/project_management_and_oversight>

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| Describe the Vendor’s Project Management and Implementation Approach and explain how the selected methodology will guide the development of each business module from kick-off to go-live and beyond. Highlight the key elements and personnel responsibilities in detail, including expectations for CSC Leon team members and stakeholders.  **Response:** |
| Describe use of project management and application lifecycle management tools, including activity assignment and tracking.  **Response:** |

1. **Meetings**

At start of the engagement, the Vendor Project Manager must facilitate a project kick off meeting with the support from the CSC Leon Project Manager and any other identified CSC Leon resources to review the approach to accomplishing the project, schedule tasks and identify related timing, and identify any risks or issues related to the planned approach. From project kick-off until final acceptance and go-live, the Vendor Project Manager must facilitate weekly meetings (or more if determined necessary by the parties) to provide updates on the project implementation progress. Following go-live, Vendor must facilitate monthly meetings (or more or less if determined necessary by the parties) to ensure ongoing support success.

Vendor must attend the following meetings, at a location and time as identified by CSC Leon, at no additional cost to CSC Leon:

1. Kick off meeting
2. Project planning sessions
3. Discovery/Requirements and analysis meetings
4. Ongoing collaborative team meetings to facilitate discovery and development (e.g., team meetings, sprint planning, sprint reviews, sprint retrospectives, user story workshops, backlog grooming, etc.)
5. All other meetings needed to successfully implement the Solution.
6. Security plan assessment and review sessions
7. **Project Control and Reports**

Once the Project Kick-Off meeting has occurred, the Vendor Project Manager and Implementation Lead will monitor the project implementation progress and report on a weekly basis to the CSC Leon Project Manager the following:

* + 1. Progress to completed milestones, comparing forecasted completion dates to planned and actual completion dates.
    2. Accomplishments during the reporting period, what was worked on and what was completed during the current reporting period.
    3. Indicate the number of hours expended during the past week, and the cumulative total to date for the project.
    4. Tasks planned for the next reporting period.
    5. Identify any existing issues which are impacting the project and the steps being taken to address those issues.
    6. Identify any new risks and describe progress in mitigating high impact/high probability risks previously identified.
    7. Indicate the amount of funds expended during the current reporting period, and the cumulative total to date for the project.

The report will include other information relevant for the delivery of the program as may be agreed upon between the Vendor Project Manager and the CSC Leon Project Manager within the project management plan.

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| Describe specific reports the Vendor will provide after contract execution and during the lifecycle of the contract, including all required scheduled reporting and details around the how and when metrics are captured/validated.  **Response:** |

1. **Discovery Phase**

The implementation approach should include a comprehensive discovery phase resulting in a design and development roadmap demonstrating a complete understanding of CSC Leon business processes and RFP goals.

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| Detail the discovery phase process including requirements validation and tracing, analysis, design, and product backlog development leading to the publication of a design and development roadmap to meet the project requirements.  **Response:** |

1. **Change Requests**

Once the development roadmap is set, any items later added or removed from the Baseline Product Backlog will be considered a change. Change is defined as a New Product Backlog Item or Change to Existing Product Backlog Item.

Changes to scope, schedule or cost must be addressed through a formal extraordinary change request process with CSC Leon and Vendor to ensure understanding, agreement and approval of authorized parties to the change and clearly identify the impact to the overall project.

* + - 1. **Standard Product Backlog Change Process.** Vendor and CSC Leon will address standard changes within the Agile framework without impact to the overall project by re-prioritization of the Product Backlog. For example, if a new high priority user story is identified during a sprint, CSC Leon can request the new user story be added to a future sprint as long as user story(ies) of equivalent size (level of effort, hours, story points, and sizing factors) are removed from the Product Backlog. Changes to the backlog that increase the overall project scope, level of effort, or timelines for the Go Live, that are not offset by compensating reductions, must be approved following the Extraordinary Change Request process set forth below.
      2. **Extraordinary Change Request Process.** If a change will cause the Product Backlog to exceed the baseline Product Backlog size (as defined by story points, level of effort, or other agreed upon sizing factors), then Extraordinary Change Process will conform to the Change Control Process as set forth in the Contract Section 2.2(b) Change Control Process and may require a contract change amendment.

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| Describe approach to Product Backlog management and Standard Product Backlog changes.  **Response:** |

1. **Testing & Data Migration**

The implementation approach should include a comprehensive testing phase and lifecycle data migration as part of its Go Live plan for each business module deployment.

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| Describe the Vendor’s testing phase including interface design, training, user acceptance, data migration, and all other activities required to complete the project.  **Response:** |
| Describe how Vendor will work with the CSC Leon to configure fields, statuses, test cases, and other items to allow lifecycle management data of each business module to be migrated at prescribed intervals and at project completion.  **Response:** |

1. **Authority to Operate**

During the development of the system and prior to go-live, a security accreditation process, resulting in an “Authority to Operate,” will be performed. Vendor will assist with this comprehensive process, at no cost to CSC Leon, and provide answers to the vendor-specific and solution-specific questions. The Implementation Approach must also consider the Americans with Disabilities Act Compliance as described in Section 5 and include the review and mitigation activities also at no cost to CSC Leon.

1. **Milestone Schedule**

The Vendor Project Manager will be responsible for maintaining a project schedule (or approved alternative) identifying tasks, durations, forecasted dates and resources required from both the Vendor and CSC Leon to meet the timeframes as agreed to by both Parties.

To aid in the full project schedule development, the CSC Leon’s proposed milestone schedule and associated deliverables from each sprint are set forth on the following page. An “X” indicates which of the three business modules are associated with the relevant milestone deliverable listed.

1. Grant Making & Contract Management
2. Performance Measurement and Information Management
3. Customer Relationship Management

While the schedule lists a final deliverable for each milestone phase or sprint, it is important to note that each milestone phase or sprint should also include standard artifacts associated with agile scrum methodology or a similar project management methodology including daily scrums, backlog clearing, testing, training, data migration (as needed), implementation, etc. It is also important to note that because CSC Leon requires an incremental implementation schedule, that a final go/no go phase commonly associated with software development is not present in the schedule below. However, for the purposes of the solution warranty, the “go live” release date of the final function would serve as the final production date and trigger the 90-day warranty period.

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| **Milestone Event** | **Milestone Deliverable(s)** | **Associated Business Module(s)** | | | **Schedule** | **Date** |
| **1** | **2** | **3** |
| Project Planning & Team Assembly | Project Kickoff Meeting | X | X | X | Contract Execution + 10 calendar days | December 10 |
| Discovery | Design and Development Roadmap Including Baseline Backlogs for Each Business Module | X | X | X | Contract Execution + 30 calendar days | December 31 |
| Sprint 0 | OTS Release of Basic CRM and Event Sign Up/Tracking |  |  | X | 2 weeks | January 16 |
| Sprint 1 | OTS Release of Grant Application Function | X |  |  | 2 weeks | January 30 |
| Sprint 2 | OTS Request for Technical Assistance with Task Flow Management |  |  | X | 2 weeks | February 13 |
| Sprint 3 | Release of Demographic and Basic Client Data Collection Portal | X | X | X | 3 weeks | March 6 |
| Sprint 4 | OTS Release of Task Management/Decision Support/Application Review Function | X |  | X | 2 weeks | March 20 |
| Sprint 5 | Release of Fiscal Activity Tracking and Reporting Function; Release of Campaign Management Tool | X | X | X | 4 weeks | April 17 |
| Sprint 6 | Release of Contract Award and Execution Function, Release of Contract Deliverable Tracking Function | X |  | X | 2 weeks | May 1 |
| Sprint 7 | Release of Performance Data Collection Portal | X | X | X | 2 weeks | May 15 |
| Sprint 8 | Release of Post-event Certificate Issuance Function | X |  | X | 1 week | May 22 |
| Sprint 9 | Release of Performance Measurement Reporting Function |  | X |  | 4 weeks | June 19 |
| Sprint 10 | Release of Performance Measurement Display Function |  | X | X | 3 weeks | July 10 |
| Sprint 11 | Release of 3rd Party Data Acquistion Tool |  | X |  | 5 weeks | August 14 |
| Sprint 12 | Release of Community Data Comparison Tool |  | X | X | 3 weeks | September 1 |
| Post Production | Warranty | X | X | X | Production + 90 calendar days | November 30 |
| Project Closeout | No Open Issues Remain | X | X | X | 15 days | December 15 |
| Integration Services | As needed | X | X | X | Ongoing | As needed |
| Maintenance & Support | As needed | X | X | X | Ongoing | Annual Renewal |

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| Vendor may propose alternative timeframes and deliverables but must provide an explanation as to why CSC Leon’s schedule and associated deliverables are not feasible.  **Response:** |

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| Provide a Work Breakdown Structure (WBS) or similar tool that corresponds with the milestone dates set forth above (or with alternatively proposed schedule). The WBS must be detailed enough to identify all CSC Leon and Vendor responsibilities.  **Response:** |

# SECTION 14 – ADDITIONAL INFORMATION

CSC Leon reserves the right to purchase any additional services or products from Vendor during the duration of the Contract.