



Office of Statewide Health
Planning and Development

Request for Offer (RFO 14-5375)

Technical Support

For:

e-Services Portal Support and Enhancements

You are invited to review and respond to this RFO. To submit an offer for these goods and/or services, you must comply with the instructions contained in this document. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO and your California Multiple Award Schedules (CMAS) contract.

Read this document carefully. The RFO due date is: August 22, 2014, 3:00 PM. Responses to this RFO and any required copies must be clearly labeled and submitted by mail or hand carried to:

Department Contact:

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August 1, 2014

General Information**1. Background and Purpose of the Request for Offer (RFO)**

The Office of Statewide Health Planning and Development (OSHPD) is seeking technical support consulting services for the maintenance support and upgrades of the e-Services Portal (eSP). These services are required to support the successful enhancements of Accela Automation, a Commercial-off-the-Shelf Software (COTS) package, as well as provide specialized knowledge and Accela skills to improve and support eSP to meet the Facilities Development Division's (FDD) business needs. An existing system overview is defined in Current Implementation (Attachment 1) and specific requirements are defined in the Statement of Work (Exhibit A). All interested firms must be current CMAS vendors in California and meet the requirements specified in this RFO. Vendors must have qualified staff available to start immediately.

FDD is responsible for performing the review of hospital and skilled nursing facility construction plans and monitoring this construction to ensure the safety of California healthcare facilities. The eSP is a mission critical system used by FDD to track health facility construction projects through plan review and construction. The eSP contains additional functionality to facilitate tracking health facility compliance with the seismic safety requirements defined by Senate Bill (SB) 1953, (Chapter 740, Statutes of 1994), track Inspector of Record certifications, and facilitate emergency operations in the event of a disaster.

In September 2011, the eSP Phase One went live in production with version 7.0.5 of Accela Automation. During Phase Two, additional business requirements were implemented along with desired new functionality available in Accela Automation version 7.2. Additional business requirements and support functionality described in this document have been identified to be implemented as part of ongoing support over the next year.

2. Key Actions/Dates

Key Actions	Date¹
Release of RFO	August 1, 2014
RFO Response Due Date (Received at OSHPD)	August 22, 2014
Anticipated Contract Award	September 5, 2014
Contract Initiation	September 22, 2014
Contract Completion	September 21, 2015

¹ All key action/dates are based on procurement document approvals and issuance of the contract document for these services. The actual initiation and completion dates will be set at the time the contract document is issued.

3. RFO Response Requirements

This RFO and all contractors' responses to this document shall be made part of the CMAS order documents and the resulting contract file. One full copy of the approved CMAS contract must be provided with the offer.

Responses must contain all requested information and data and conform to the format described in this section. It is the contractor's responsibility to provide all necessary information OSHPD needs to evaluate the response, verify requested information and determine the contractor's ability to perform the tasks and activities defined in the Statement of Work (Exhibit A) and Cost Worksheet (Exhibit B).

Each contractor must submit one (1) copy of the response on digital media in MS Word 2007 compatible or Adobe PDF format, one (1) printed original and three (3) printed copies of the RFO response to the Department Contact no later than 3:00 p.m. Pacific Time on August 15, 2014. Electronic only responses will NOT be accepted. Late or incomplete RFO responses will not be considered.

Final Checklist (Exhibit D) has been provided to ensure all requirements are included in the RFO response submitted to OSHPD.

4. RFO Proposal Content

Technical Proposal for the Statement of Work (Exhibit A) – Contractors must submit a response that maps each task/deliverable to the requirements. The response must include:

- A. Evidence of understanding of the project/work requirements
- B. A proposed approach to complete the work objectives
- C. A description of the vendor's testing approach and samples
- D. Qualifications of the firm including at least two (2) non-OSHPD references from previous projects that are similar in nature and scope to this project (reference name, title, company/agency, phone number and e-mail address are required)
- E. Resumes for each proposed project staff person and an explanation setting forth how each person is qualified for the proposed role
- F. Costs – Complete Exhibit B: Cost Worksheet detailing Fixed Price Component cost and direct labor and other costs for Work Orders

Administrative Requirements: Contractors must include all of the required or applicable items identified below:

Requirement Item	Requirement Status
Payee Data Record (STD 204)	REQUIRED
Full CMAS Contract	REQUIRED

Requirement Item	Requirement Status
Contractor Certification Clauses (Form CCC 307)	REQUIRED
Disabled Veterans Business Enterprise (DVBE) Preference	Not Required. However, indicate in your response if you are a Certified DVBE and include a copy of your certification.
Small Business Preference	Not Required. However, indicate in your response if you are a Certified Small Business and include a copy of your certification.
List of subcontractors	If used, your response must identify all subcontractors you intend to use for this project. Provide the subcontractor's firm name, address, contact person, phone number, key personnel identification and resumes. Subcontractors are subject to all CMAS terms and conditions.

5. Contractor Minimum Qualifications

The contractor must meet the following minimum qualifications to be given further consideration:

- A. Must be a qualified CMAS vendor in good standing with the Department of General Services.
- B. Must be able to demonstrate understanding of the California Project Management Methodology, Systems Development Life Cycle (SDLC), and the implementation of COTS software solutions.
- C. All technical personnel must have at least two (2) years' experience working with Accela Automation (AA), Accela Citizen Access (ACA) and Accela Wireless/Accela Mobile Office (AMO). Experience must include significant work using release 7.2 (Feature Pack 2) of the software.
- D. All key personnel must be on site at OSHPD Sacramento office at least 3 days a week or 60% of their allocated time during OSHPD business hours and for the duration of the contract or as otherwise agreed upon in writing between the vendor and OSHPD.

6. Key Personnel

The following roles are considered key personnel and are required to be provided by the contractor. Individuals may fill more than one role and one role could be filled by multiple individuals.

- A. Technical Expert in Accela – responsible for all technical design and support. Must have three (3) years' experience supporting Accela implementations and upgrades.

Must have also demonstrated an in-depth understanding of all components of the Accela suite of products that has been implemented at OSHPD (Accela Automation, Accela Citizen Access, and Accela Mobile Office), Accela's software architecture, and Accela's database structure. Must have experience in Accela's configuration capabilities (minimum of two (2) years' experience), Event Manager Script Engine (EMSE 2.0) scripting (minimum of two (2) years' experience), and Accela's reporting capabilities. Technical Expert must have experience with multiple implementations of Accela Automation for different clients.

- B. Business Analyst – responsible for working with OSHPD's technical and business staff in the definition and documentation of requirements that are consistent with the Accela software framework. Proposed staff must have a minimum of two (2) years' experience performing business analysis and one (1) year experience working with implementations of the Accela suite of products including Accela Automation, Accela Citizen Access, and Accela Mobile Office.

Provide an organizational chart identifying contractor's proposed team and the areas of expertise. Use both working titles (if applicable) and CMAS approved titles of key personnel named in this RFO. Describe the qualifications of proposed staff members and include resumes. Include the percentage of time for each staff member assigned to each role on the project.

7. Approach

In your proposal, the technical proposal must describe how your company would approach this engagement and the deliverables listed in Statement of Work (Exhibit A) to achieve the best outcomes.

8. Evaluation Process

Selection will be based on the best overall value. RFO proposals that meet all requirements for a complete response will be considered "responsive." Responsive proposals will be assessed using a two-step method to determine the selected offer.

Step 1 – Each response will be assessed based on the technical review factors/criteria as outlined in the following table. The technical review has a possible value of 50 points. Prospective proposals must receive a minimum of 35 points to be considered "responsive." Proposals that fail to meet the minimum technical points will be rejected. Only the "responsive" offers will be considered in Step 2.

Step 2 – Cost has a possible value of 50 points. The points will be determined according to the criteria/formula specified in the following table.

CATEGORY AND CRITERIA	MAXIMUM POINTS = 50
<p style="text-align: center;">EXPERIENCE</p> <ul style="list-style-type: none"> • Demonstrates minimum qualifications of key personnel. • Staff experience corresponds with characteristics of current project. • Demonstrates understanding of Accela's software infrastructure and components. 	<p>Possible Points: 15 (5 points each)</p> <p>Points are awarded to responses that adequately address experience and knowledge in each area listed.</p>
<p style="text-align: center;">APPROACH CLEARLY STATED</p> <ul style="list-style-type: none"> • Describes the services and the methodology the firm proposes for this project. • Includes a project plan and staffing plan. • Demonstrates a suitable approach for FDD's business needs. • Provides sample or preliminary deliverables. 	<p>Possible Points: 20 (5 points each)</p> <ul style="list-style-type: none"> • Clearly describes the approach, services and methodology. • Clearly demonstrates an approach tailored to meet FDD's specific needs.
<p style="text-align: center;">REFERENCES</p> <p>References for work of similar engagements comparable in scope to this project or to larger projects.</p>	<p>Possible Points: 15 (5 points each)</p> <p>References for similar engagements demonstrate:</p> <ul style="list-style-type: none"> • Previous work met expectations and was delivered timely. • Effective communication on issues. • Previous work demonstrated, quality of work performed and products delivered.
Minimum score of 35 points must be met on the above criteria.	
<p style="text-align: center;">COST</p> <p>Lowest offer receives maximum points. Points for other responses will be decreased based on the percentage difference in total cost.</p>	<p style="text-align: center;">Possible Points: 50</p> <p>Example: Lowest response cost is \$400,000. Next lowest total cost is \$440,000. Percentage difference = 10%. If score is 50 points, then 10% x (50) = 45 points.</p>

Exhibit A: STATEMENT OF WORK

1. Scope and Description

The contract will have two (2) components:

- A. Component One: *Fixed price/deliverable based portion*. The scope of the fixed price components are defined in Section 2.C. The deliverables for each fixed price component are defined in Section 4.
- B. Component Two: *Time and Materials portion*. The time and materials portion will be based on 20% of the total cost for fixed priced items and included within the cost proposal. During the course of the project, OSHPD will request, through an approved Work Order process (See Exhibit C for an example Work Order Authorization Form), a defined scope of work to be accomplished by the contractor. The contractor will estimate the cost to complete the scope of work and propose staff to be approved. No work performed without an approved Work Order Authorization (Exhibit C) will be paid. The deliverables for each approved Work Order are defined in Section 4. Once approved, contractor will be paid on a deliverable basis as defined in Section 4.

2. Contractor Responsibilities

- A. Expectations:
 - 1) Complete the tasks according to an agreed upon scope of work as defined in this contract and through design sessions during the execution of this contract.
 - 2) Employ qualified/certified professional staff – OSHPD project manager must approve changes in the contractor's project staff in advance
 - 3) Supervise contractor's staff
 - 4) Develop a quality assurance plan for each deliverable or work order and follow the plan in development, completion and delivery of all contract deliverables
 - 5) Conduct Requirement and Design Sessions (JADs) to refine requirements specified in this document or through Work Orders
 - 6) Attend status meeting and prepare status reports as required.
 - 7) Complete all deliverables for each fixed price component or approved Work Order as specified in Section 4.

- B. Time and materials

The contractor will provide the following skill sets required to complete the time and materials portion of the contract:

- 1) Advanced experience with Accela Automation (AA), Accela Citizen Access (ACA), and Accela Mobile Office (AMO) configuration and deployment
- 2) Advanced Accela Scripting and Java Scripting
- 3) Database performance tuning
- 4) Advanced Crystal/SSRS report writing

C. Fixed Price Components

The contractor will be responsible for the implementation of the following ten (ten) fixed price components:

- 1) Enable Accela Electronic Document Review: expected completion during first 3 months of contract.

Description/Background: FDD vision is to preform document review on line reducing paper footprint and increasing collaboration and project turn around. This requirement will enable FDD management to evaluate the functionality of the Accela Electronic Document Review to determine if it meets the business needs of FDD. The item includes the development of recommendations and instructions for OSHPD on integration with eSP and best practices for implementing to meet OSHPD needs

Id	Description
1.1	Enable Accela Electronic Document Review feature for evaluation.
1.2	Assist OSHPD in the identification of storage needs and options.
1.3	Assist OSHPD in the implementation of a pilot project to determine the feasibility of Accela EDR tools to meet OSHPD's business needs.

- 2) Implement additional functionality for Time and Materials, fee assessment, and invoicing: expected completion during first 9 months of contract.

Description/Background: Some OSHPD projects are billed on a Time and Materials (T&M) basis. The current system uses a combination of workflow history and the Accela Time Accounting features (implemented for enforcement module only) in addition to scripting and Application Specific Information Tables (ASITs). The objective is to expand existing functionality to encompass more project types, allow fee assessment method to change for a project, make the invoice data more accurate, and provide additional flexibility.

Id	Description
2.1	The solution must allow staff to identify time entered as straight time or overtime
2.2	The solution must allow staff to record the role they were playing during that time (for instance, a manager may be performing architectural tasks or performing field visits in absence of a field staff)
2.3	The solution must have the ability to add comments for each entry for auditing purposes
2.4	The solution must have the ability to allow users to enter expenses incurred

2.5	The solution must distinguish between invoiced and non-invoiced items (both time and expenses)
2.6	The solution must have the ability to invoice by role
2.7	The solution must have the ability to update rates as needed
2.8	The solution must be able to use the person's rate as of the time period when the work was performed
2.9	The solution must have the ability to update rates by staff classification and by person
2.10	The solution must provide a list of standard expense categories such as Travel, Meals, Per Diem, etc.
2.11	The solution must provide at least two approval levels for expenditures before fees are assessed and invoiced
2.12	The solution must provide the ability to enter estimated hours and actual time per task and report on differences between them
2.13	The solution must be able to assess and invoice application fees based on the project type. Based on project type, this application fee may be part of the overall fees or in addition to the overall fees
2.14	The solution must have the capability of automatically invoice (or assess) fees based on: <ul style="list-style-type: none"> • Workflow status • Data in the system (i.e. Row marked Final Cost in an ASIT) • Calendar (monthly invoice)
2.15	The solution must have the capability to assess and invoice fees on a T&M basis for all record types
2.16	The solution must have the capability to allow certain users to change if a project is invoiced on T&M basis or based on costs.
2.17	The solution must have the ability to deliver or send the invoice by email or print and mail
2.18	The solution must have the ability to print invoices in batch mode (all invoices between two dates for instance)
2.19	The solution must have the ability to print invoice by record type
2.20	The solution must provide the ability to printing a summary of all unpaid invoices for a given project - i.e. there could be currently 20 invoices for a project due to Post Approval Documents (PADs)
2.21	The solution must provide the ability to print summary or detail invoices for T&M. In addition to invoiced fees, the detailed invoices include the classification, the number of hours charges and the hourly rate
2.22	The solution must have the ability to recover if interrupted (i.e. keep track of what was

	processed in a batch before power loss)
2.23	The solution must have the ability to continue to generate 1st, 2nd, and 3rd notices
2.24	The solution must have the ability to track when an invoice was printed, when the first, second, and final notices were printed in such a way that these are mailed only once. Note: invoices are currently printed in a batch process once or twice a week. This process will print all invoices to-date that have not been printed before.
2.25	The solution must continue have the ability to not invoice if fees less than \$5.
2.26	The solution must have the ability to receive process and track refund requests.
2.27	Continue the ability to determine project total cost vs estimates within X%. If the difference is greater than X, process refund or additional billing. (X is set by legislation and needs to vary)
2.28	The solution must have the capability to email invoices to appropriate billing contacts

- 3) Implement changes to the existing guidesheets: expected completion during first 3 months of contract.

Description/Background: Current implementation uses an Accela guidesheet fields to capture the project's percent complete. This requires field staff to navigate through several steps to be able to view the last entered % complete, close that field operations record (inspection), and then requires staff to open new guide sheet and process several screens to edit the % complete. Staff needs to be able to view % complete easily and edit the % complete value. This field will be integrated into mobile office as easily viewable and editable and when offline, sync with AA when reconnected.

Id	Description
3.1	The solution must provide the capability for field staff to easily enter and access the % construction complete field. Note: The percent complete is a value estimated by the Area Compliance Officer, it is not a value calculated by Accela
3.2	The solution must provide a streamlined Certificate of Occupancy Guidesheet
3.3	Issuance of Construction final would set % complete to 100 and advance workflow
3.4	Clean up existing records based on solution
3.5	Update existing field operations reports based on solution

- 4) Implement new functionality for Task Assignment and Due Date calculation: expected completion during first 6 months of contract.

Description/Background: Currently, tasks are assigned via EMSE. Initially all tasks are assigned to the FDD manager for the project region. The FDD manager then assigns the tasks to each discipline. For projects at backchecks, all tasks will have automated assignments based on project history. This process is repeated for related records as these do not use the data from the parent project for the assignments. This task encompasses the development of the ability to use parent project workflow data to perform task assignments to related records.

Due dates are calculated via EMSE when staff completes the initial intake task and when the triage results task is resulted. However, in order to better manage resources, FDD Management would like to be able to override system calculated dates. This override will only be allowed as long as the new date is before the system-calculated due date.

Id	Description
4.1	The solution must allow the user to manually enter due dates as long as they are earlier than system calculated due dates and not overwrite when actions occur.
4.2	The solution must allow user to revert to default system dates
4.3	The solution must assign staff to a task based on last staff to be assigned to that activity for that project. Staff assignment for child records must follow same pattern as the parent project unless overridden by the FDD Manager.
4.4	The solution must verify that the staff assignment is not made to an inactive user. If the staff is inactive, the solution must assign the task to the FDD manager and generate a notification.
4.5	The solution must allow batch staff reassignment in the case personnel movement and retirements.
4.6	The solution must assign sequential tasks after plan approval to field staff based on rules to be defined as part of JAD sessions to be conducted as part of this engagement.
4.7	The solution must have the capability to assign ad hoc tasks to staff based on workflow actions or data updates. For example refund request may be assigned to RCOs and back to accounting.

- 5) Implement Closure Process Improvement and Automation of Project Closure: expected completion during first 9 months of contract.

Description/Background: Once a construction project is complete, there is a series of administrative steps required to close the project in compliance with California Building and Administrative codes. This item refers to the steps needed to close those projects that stay open due to failure of facility to respond.

Id	Description
5.1	The solution must have the ability to notify appropriate internal and external users when a facility has not responded to required actions within the allowed time frame
5.2	The solution must be able to prevent data duplication by automatically copy data from workflow and related records to the project. Details of what needs to be copied and when will be defined during the JAD sessions
5.3	The solution must notify staff when certain updates to Workflow tasks or data take place. For instance final cost added, final payment received, etc
5.4	The solution must automatically assign the closure tasks to appropriate staff
5.5	The solution must stop the closure process when the Verified Compliance Reports (VCRs) have not been received for the required professionals
5.6	The solution must have the ability to track when refund requests are received, approved by the RCOs and processed by Accounting
5.7	The solution must track the amount of time since a refund request has been received and alert staff after a number of days to be determined based on project characteristics

- 6) Implement automatic notifications: expected completion during first 6 months of contract.

Description/Background: Currently, the eSP system relies on staff emailing each other when certain events occur. The objective of this task is to implement automatic notifications driven by data or workflow updates

Id	Description
6.1	The solution must have the capability to notify stakeholders (i.e. facilities owners, design professionals, local fire authority, state licensing department) at specific milestones such as when response is required or there is a deadline. These are based on workflow and data updates. Specific triggers will be defined during the JAD sessions
6.2	The solution must provide the capability to send Notifications to emails determined by ASI and standard choice values.
6.3	The solution must provide the capability to automatically email documents generated by the system such as letters or invoices

- 7) Implement Workflow Simplification/Review at Triage: expected completion during first 6 months of contract.

Description/Background: As described in the current implementation section, most records have two sets of parallel tasks and two summary tasks followed by a set of sequential tasks. Task specific information (TSI) is captured in both sets of parallel tasks. Currently, a scripting workaround activates both sets of parallel tasks simultaneously; however, this created problems as it negates some of Accela's workflow engine functionality. This requirement includes the creation of an alternate workflow for those records where the FDD manager determines that "review at triage" is feasible. Reports may need to be modified to accommodate these new workflow steps. This task includes the modification of the existing Accela configuration, scripts, reports, and data, as needed

Id	Description
7.1	The solution must allow staff to complete a review in one step for those cases where the discipline review can be performed at triage.
7.2	Plans review at triage still need to capture estimated number of hours and Testing, Inspection, and Observation (TIO)/Local Approval fields (TSI).
7.3	The solution must allow each discipline to determine if Review at Triage is appropriate for that discipline independent of other disciplines
7.4	The solution must allow a discipline to perform review at triage during a review cycle but perform triage/review in a subsequent review cycles
7.5	The solution must preserve OSHPD's functionality using Triage and Review History tables (see current implementation document)
7.6	All solution components (reports, scripts, configuration, etc.) must accommodate records that were created under the current workflow as well as records created under the simplified workflow

- 8) Identify and implement areas where additional validation is needed: expected completion during first 9 months of contract.

Description/Background: Current implementation uses Scripting and Expression Builder to perform data validation. However, there is a need to add additional validation rules throughout the system to minimize entry errors and increase data accuracy

Id	Description
8.1	The solution must validate that when a building number is added to the project, the building belongs to the selected facility
8.2	The solution must eliminate the need for duplicate data entry throughout the system. For instance, when a licensed professional is added, the license number

	must be copied to the ASIT that tracks if the verified compliance reports have been received
8.3	The solution must enforce record hierarchy – for instance, a post approval document (PAD) must not be created as new record, only through cloning (or amendment in ACA)
8.4	The solution must provide a warning to the user when there is an event that creates cost change of more than x% to the overall cost of the project. This percent will be determined during the JAD sessions and may depend on factors such as project type, size and cost.
8.5	When a PAD reduces the scope of the project, this PAD has a negative cost. The solution must validate that this cost does not make the overall project cost negative
8.6	The solution must provide the capability to perform “reasonableness” checks. For instance, the range of cost of a project is determined by square footage, project type, type of facility and other factors. Another example is SB1838 projects cannot have a new building project. Specific requirements will be determined during JAD sessions, but it is expect that Accela built in functionality is not sufficient.
8.7	The solution must warn the user when a PAD is added after the final project cost has been entered.
8.8	The solution must prevent the user from adding a related record to a Closed project both AA and ACA
8.9	The solution must integrate validation of professional licenses against the licensing boards where the licensing board provide this functionality
8.10	The solution must auto fill data based on prior data where possible.

- 9) Implementation of Inspector of Record Performance Reporting: expected completion during first 3 months of contract.

Description/Background: Inspectors of Record (IORs) are Licensed Professionals retained by the facility owners to inspect hospital construction projects. OSHPD has implemented a new Standard Operating Procedure (SOP) for evaluating IORs to determine performance. The evaluation consists of 8 performance factors rated as Meets, Does not Meet or NA. The evaluation also contains comments. The performance assessment will be done at predefined points in a project and scaled according to project length. The implementation of scoring would not perform any actions based on scoring except for communication and documentation. IORs could be assigned to multiple projects at the same time. A project can have multiple IORs. Triggering of performance will be based on project. All performance assessments are associated with an IOR. There will need to be reporting and trending over time. Results can be publically viewable. Depending on the project, results may be required to be attached to a HICP report for a project.

Id	Description
9.1	The solution must alert/notify OSHPD staff that an IOR evaluation for a project is due or upcoming. For instance, a project less than 6 months may only have one performance assessments at the end of the project while projects > 6 months would have regularly scheduled throughout the project.
9.2	The solution must associate performance evaluations to specific IOR being evaluated.
9.3	The solution must allow support of multiple project assignments for an IOR
9.4	The solution must provide reports based on IOR evaluations. These include individual, summary, and trend reports

10) Implementation of bar coding to allow the printing of barcodes on reports: expected completion during first 6 months of contract.

Description/Background: FDD desires all project reports to have barcodes imbedded which would tie back to the project. Reports are considered to be all documentation generated by eSP including reports, letters, invoices, labels, etc.

Id	Description
10.1	The solution must select and implement a bar coding mechanism that can be used for internal and external reports
10.2	The bar code used in external reports must allow external users (ACA users) to print the reports with the barcode without the need to install additional fonts or software on their computers.
10.3	The solution must be useable on existing and new reports developed by OSHPD staff.
10.4	Number of reports, letters, and labels shall be determined during JAD sessions.
10.5	The solution must support QR codes.

3. State Responsibilities

OSHPD will:

- A. Assign a Project Manager to manage and coordinate the work efforts;
- B. Clarify the work to be done through design sessions;
- C. Schedule meetings as needed and approved with program staff and external stakeholders;
- D. Review interim and completed deliverables;
- E. Accept/reject the completed deliverables;

F. Make payments for the contractor's work upon acceptance of all deliverables for a phase (Section 4) for fixed price components (Section 2.C) and approved Work Orders when invoiced as defined in Section 4;

G. Provide computers and workspace for up to four (4) contractor staff.

4. Deliverable Requirements – Fixed Price Components and approved Work Orders

During the duration of the contract, the contractor shall provide the following deliverables for each phase in the process for the solution to each fixed price component (Section 2.C) and each approved Work Order in addition to the requested functionality (All deliverables must be in MS Office Suite Product 2007 Compatible formats):

A. Design Phase

During the design phase, the contractor and OSHPD staff will hold joint application develop sessions (JADS) to refine requirements of the feature being implemented, develop the quality assurance requirements, and determine the measures of success. These deliverables must be approved before work can begin on a fixed price component or approved Work Order. Upon completion of the design phase, the following accepted and approved deliverables are required:

- 1) Project Work Plan (schedule) – a MS Project document using a work breakdown structure (WBS) and includes OSHPD required tasks. The Project Work Plan must be signed off as accepted by OSHPD Project Manager
- 2) Requirements documentation stating the agreed functionality of the feature, the quality assurance requirements, user acceptance details, and the measures of success. This documentation must be signed off as accepted by OSHPD Project Manager.
- 3) Design reviews with OSHPD technical staff on proposed solution. Design reviews will be documented and signed off as accepted by OSHPD technical staff.
- 4) Test Plan to be used by the contractor to demonstrate that functionality delivered meets the quality requirements – this does not replace OSHPD's System and User Acceptance testing. This must be approved by OSHPD Project Manager before work can begin on a fixed price component or approved Work Order.

Upon OSHPD acceptance of all the deliverables associated with the design phase for the fixed price component or approved Work Order, the contractor may invoice for 30% of fixed price component or approved Work Order less 10% withholding.

B. Development Phase

During the development phase, the contractor will follow the project work plan to develop the features as documented in the requirements documentation and execute the test plans to demonstrate the functionality. Upon completion of the development phase, the following accepted and approved deliverables are required:

- 1) Demonstration of the implemented solution with OSHPD technical and support staff as defined in the design phase. OSHPD lead technical staff will document and sign off that functionality has been demonstrated and accepted.
- 2) Documentation of implemented solutions – this includes both system and end-user documentation. Implementation documentation shall include but not limited

to deployment instructions and information required for OSHPD technical staff to maintain the solution. This must be delivered and signed off as accepted by OSHPD lead technical staff in order for the solution to be accepted.

3) Knowledge Transfer, Training, and Training Materials

For each of the fixed price components listed in section 2.C or approved Work Order, the contractor will provide knowledge transfer and training through the following documented activities:

- A. Walkthroughs with OSHPD technical staff of scripts, configuration, and reports for implemented solution. Walkthrough will be signed off as accepted by consultants conducting the walkthrough and the OSHPD technical staff participating in the walkthrough.
- B. Review with OSHPD technical staff of unit test plan results for the implemented solution. All test plans and results will be documented and delivered as part of the functionality acceptance. Documentation will be signed off as accepted by OSHPD technical staff.
- C. Provide technical training materials as appropriate to the delivered functionality and training. This documentation will be signed off as accepted by OSHPD staff.

Upon OSHPD acceptance of all the deliverables associated with the development phase for the fixed price component or approved Work Order, the contractor may invoice for 40% of fixed price component or approved Work Order less 10% withholding.

C. System Acceptance Phase

During the acceptance phase, the solution will be evaluated by OSHPD through systems acceptance testing and UAT testing. Upon completion of the acceptance phase, the following accepted and approved deliverables are required:

- 1) Design with OSHPD technical and support staff User Acceptance test plans when required develop training materials as defined during design phase. UAT plans and successful execution by OSHPD will be required for acceptance of the solution. OSHPD technical staff will document the UAT plans and results. This documentation will be signed off as accepted by OSHPD technical staff.
- 2) Assistance in deployment to System Test, UAT and Prod environments as described in the instructions developed in the development phase. Deployment timelines will be set by OSHPD technical staff and may include more than one solution. Successful deployment to each environment will be documented. This documentation will be signed off as accepted by OSHPD technical staff.
- 3) Work with OSHPD technical team to resolve issues and document during system test and UAT testing. The contractor will implement any corrective action deemed required as a result of testing. Test result documentation and correction action plans will be documented, signed off as accepted by OSHPD technical lead.

Upon acceptance of all the deliverables associated with the acceptance phase for the fixed price component or approved Work Order, the contractor may invoice for 30% of fixed price component or approved Work Order less 10% withholding.

5. Acceptance of Deliverables

OSHPD will be the sole judge of the acceptability of all required deliverables produced by the contractor as a result of this Agreement. OSHPD agrees to work with the contractor to define acceptance criteria prior to deliverable development. OSHPD may conditionally accept a deliverable and require the contractor to create a Corrective Action Plan to address outstanding items. Payment for deliverables will be approved based upon OSHPD acceptance of the deliverable.

It shall be the State's sole determination as to whether a deliverable has been successfully completed and acceptable to the State. There must be a signed acceptance document for each deliverable before invoices can be processed for payment.

Acceptance criteria shall consist of the following:

- A. Reports on written deliverables are completed as specified and approved.
- B. All deliverables must be in a format that can be used by the State.
- C. If a deliverable is not accepted, the State shall provide the rationale in writing within fourteen (14) business days of receipt of the deliverable or upon completion of acceptance testing period.

6. Dispute Resolution

For the contractor's deliverables that fail to meet the terms and conditions of this contract, minimum OSHPD conditions, expectations, requirements or other applicable standards, specifications or guidelines, the following resolution process will be employed:

- A. OSHPD will notify contractor in writing of deliverable non-acceptance by identifying the specific inadequacies and/or failures in the deliverables produced by the contractor.
- B. The notification will occur within fourteen (14) business days of receipt of deliverable. If no notification is provided by OSHPD within fourteen (14) business days, the contractor may invoice and bill for the deliverables.

7. Travel

OSHPD will not reimburse the contractor's travel costs.

8. Contract Amendments

In the event of unforeseen delays, this contract may be amended to add time and/or money at the same rates as listed on the contractor's proposal. All amendments must be consistent with selected contractor's CMAS agreement and state contracting laws and policies.

9. Additional Contract Terms

The contractor is expected to provide all deliverables over the period of the contract. The contract term is to begin by September 22, 2014 and not exceed 1 year and 3 months in duration. Services proposed on this offer cannot exceed \$499,000.00

dispersed over the term of the contract. The contract is subject to CMAS terms and conditions between the contractor and the State of California.

Progress payments will be made upon written acceptance of the work provided under this contract. Withholding of 10% per invoice will apply. Invoices must include the Agreement Number and be submitted in triplicate to:

Office of Statewide Health Planning and Development
Accounting Office
400 R Street, Suite 359
Sacramento, CA 95811

Payment of the 10% withhold for each fixed price component (Section 2.C) and each approved Work Order will be approved for payment after 30 days in production without encountering defects requiring corrective action and the implementation of all corrective actions as a result of conditionally accepted deliverables identified in Section 5 or defects found in production.

Exhibit B: Cost Worksheet

Fixed Price Component Costs

Cost Item	Total
1) Enable Accela Electronic Document Review	\$
2) Implement additional functionality for Time and Materials, fee assessment, and invoicing	
3) Implement changes to the existing guidesheets	
4) Implement new functionality for Task Assignment and Due Date calculation	
5) Implement Closure Process Improvement and Automation of Project Closure	
6) Implement automatic notifications	
7) Implement Workflow Simplification/Review at Triage	
8) Identify and implement areas where additional validation is needed	
9) Implementation of Inspector of Record Performance Reporting	
10) Implementation of bar coding to allow the printing of barcodes on reports	
SUBTOTAL	\$

Direct Labor for Time and Materials

STAFF PERSON NAME	CLASSIFICATION	HOURS	HOURLY RATE	TOTAL
			\$	\$
SUBTOTAL				\$

Subcontractor Labor for Time and Materials

SUBCONTRACTOR NAME	CLASSIFICATION	HOURS	HOURLY RATE	TOTAL
			\$	\$
SUBTOTAL				\$

TOTAL COST / AMOUNT	\$
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Exhibit C: Work Order Authorization Form Example

Work Order Authorization Form

Title:			
Contract #:		Work Authorization #	
Start Date:		Internal Track-It! #	
Completion Date:		eSP CB Approved:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Task Summary:			
Task Description: Brief description of unanticipated task to be performed under the Work Authorization:			
Acceptance Criteria:			
These task(s) will be performed in accordance with this Work Authorization and the provisions of the Contract.			

Vendor Staff to be Assigned	Skill Level	Hourly Rate	Total Estimated Labor Hours	Total Estimated Cost
		Total:		

Contractor's Project Manager

OSHPD Project Manager

Date

Date

Exhibit D: Final Checklist

The offer package must include the following:

- Cover Letter identifying the firm's primary contact, phone number and email address
- Technical Proposal as requested in Section 4, RFO Proposal Content
- Organizational Chart and Key Personnel Information including resumes: Section 6, Key Personnel
- Cost Worksheet, Exhibit B, as requested in Section 3, RFO Response Requirements
- Payee Data Record (STD 204) as requested in Section 4, RFO Proposal Content
- Contractor Certification Clauses (CCC 307) form as requested in Section 4, RFO Proposal Content
- One (1) copy on digital media in MS Word 2007 compatible format or Adobe PDF; Original and three (3) printed copies of the offer package as requested in Section 3, RFO Response Requirements
- Full copy of the CMAS package as requested in Section 3, RFO Response Requirements

ALL OFFERS MUST BE SENT OR DELIVERED TO:

Office of Statewide Health Planning and Development
Attn: Dan Laffoon
Request for Offer 14-5375
400 R Street, Room 387
Sacramento, CA 95811

ALL OFFERS MUST BE RECEIVED AT THE ABOVE ADDRESS NO LATER THAN 3:00 P.M. PACIFIC TIME ON AUGUST 15, 2014. RFO RESPONSES RECEIVED AFTER THIS TIME WILL BE REJECTED.

Attachment 1: eSP Current Implementation

Base Software: Accela 7.2 hotfix 19, planned upgrade to 7.3.2 in August 2014.

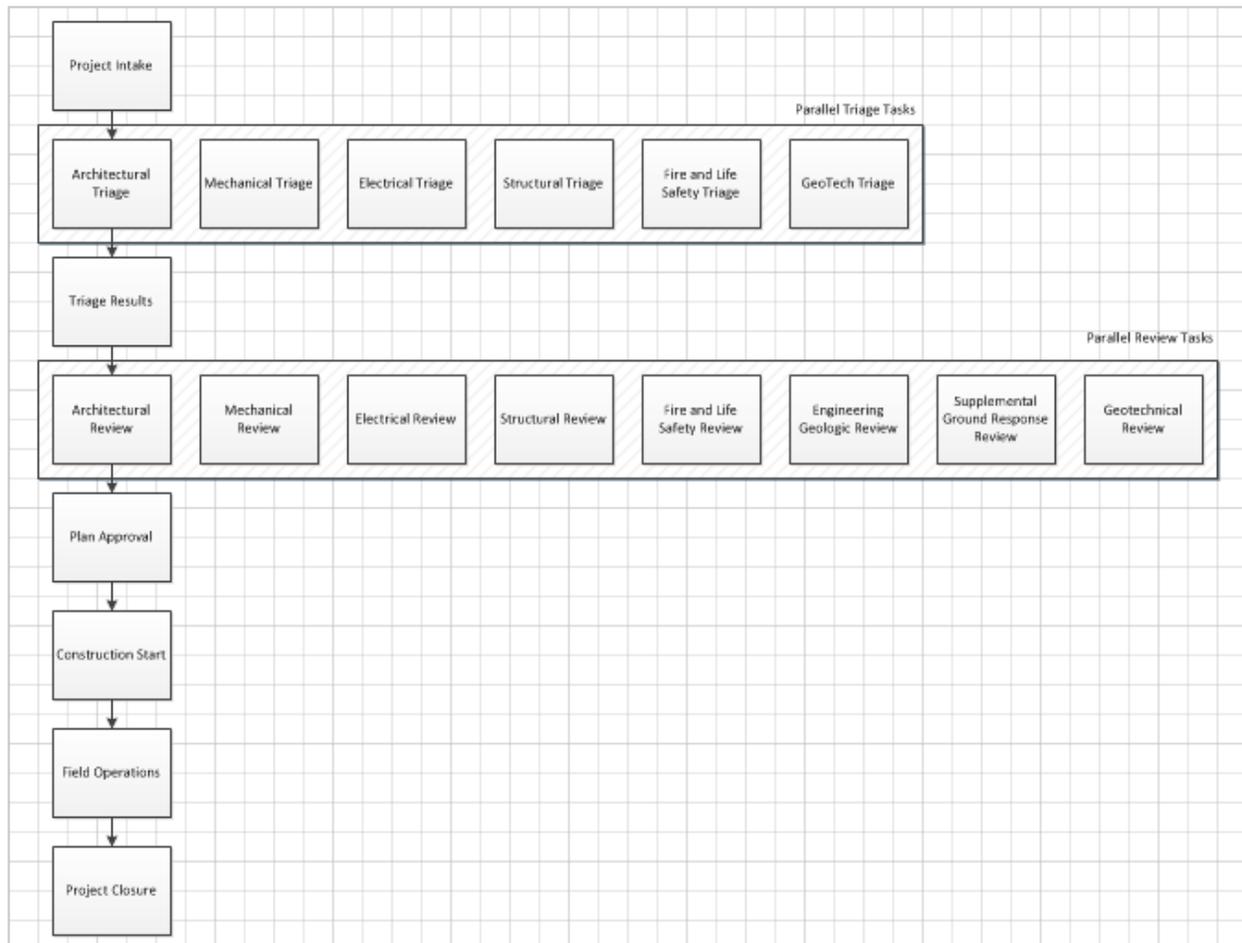
Components Installed:

- AA – fully operational with both permits and enforcement modules implemented.
- ACA – implemented for both registered and unregistered users. Credit Card payment implemented. Custom built security model where a personal identification number is required by the facility before a record can be submitted
- AMO – installed but not implemented yet

<i>Application Type</i>	<i>Sub-Type</i>	<i>Category</i>	<i>Implemented in ACA</i>
Module: Enforcement			
Unauthorized Construction	Investigation	NA	N
Module: Permits			
Alternate Method of Compliance	NA	NA	Y
Annual Building Permit	Master	NA	N
App for Building Permit	NA	NA	Y
Application for New Project	NA	NA	Y
Application for Seismic Ext	NPC	NA	N
Application for Seismic Ext	SPC	NA	N
Buildings	NA	NA	N
EOC	Event	NA	N
EOC	Incident	NA	N
Hospital Inspector	Class A	NA	N
Hospital Inspector	Class B	NA	N
Hospital Inspector	Class C	NA	N
Hospital Inspector	HIC Re-Certification	NA	N
Incremental	Increment	NA	N
Incremental	Master	NA	N

Phase Segment	NA	NA	N
Post Approval Document	NA	NA	Y
Seismic Retrofit Program	App for Seismic Eval Report	NA	N
Seismic Retrofit Program	Compliance Plan Review	NA	N
Seismic Retrofit Program	Request for NPC or SPC Upgrade	NA	N

Typical Workflow – although each record type has its unique workflow and record status, most of the Plan Review records have a workflow that uses parallel tasks and summary tasks as shown in the diagram below.



Scripting – currently using EMSE 2.0, approximately 200 scripts and some custom functions

Reporting – using Crystal and SSRS. There is an ongoing effort to phase out Crystal Reports.

Implementation approach - OSHPD's implementation of Accela has the following non-standard characteristics:

- The parcel record is used to hold facility data including the repurposing of the Legal Description to hold the Facility Name
- Multiple fields repurposed from the original Accela design to hold OSHPD's data
- Additional tables within the Accela database to hold workflow history: Due to Accela's lack of history on TSI's, a process was developed to write and delete data to a database table outside of the normal Accela tables using EMSE. When certain workflow statuses are applied, the data from the workflow task and status plus TSI's from the task are sent to these customized tables. In order to keep these tables in sync with Accela's workflow history, there is a process to load and unload data values from these custom tables to an ASIT to allow to delete data from the custom table when needed.
- Separate database to track mailing history of invoices and late payment notices and to allow batch printing of these documents
- Separate database to store OSHPD's data in a simplified database structure to enable user query capability

Hardware/Configuration – OSHPD currently has four environments: Development, Test, User Acceptance Testing and Production. The hardware and software in these environments are similarly configured except for the fact that Production has two sets of servers with load balancing provided by F5. Each environment has web, application, reporting and database servers. Database servers are running MS Server 2012, other servers are running 2008R2.

Database – SQL Server 2012