

**Automated Client Eligibility Determination System (ACEDS)**  
**Project Manager**

**Statement of Work**

**1 Background**

The Office of the Chief Technology Officer (OCTO) of the Government of the District of Columbia, in collaboration with the health, social services, education, courts and related agencies of the District government, has embarked on an ambitious program to upgrade and integrate the information systems that support client services for city residents, particularly those requiring support services. OCTO has devised a strategy for accomplishing this successive upgrading of the client services through implementation of secure, flexible technological architecture enabled by Enterprise Application Integration (EAI) middleware and anchored by data marts built on secure databases. (See *Supporting the Vision: Mayor's Plan to Integrate the District of Columbia's Social Services Information Systems with the Family Court of the DC Superior Court* which describes how this strategy will be applied to enable the exchange and/or view of information among District agencies, the Family Court of the DC Superior Court and other organizations under the aegis of the Safe Passages Information System initiative. The report is available at <http://octo.dc.gov/information/inter.shtm> )

This initiative will encompass, but not be limited to, business process engineering, system replacements, system enhancements, new systems selection, custom enhancements of existing applications, system integration, and IT oversight, affecting the health and human services and related District agencies. The major agencies/departments impacted include the Child and Family Services Agency (CFSA), Department of Mental Health (DMH), Department of Health (DOH), Department of Human Services (DHS) and agencies whose functions closely interrelate to these organizations including DC Public Schools (DCPS), Metropolitan Police Department (MPD), Office of the Attorney General (OAG), and DC Superior Court, among others.

This effort will be accomplished through a series of inter-related information technology (IT) projects that will be managed, and/or coordinated within OCTO. OCTO will collaborate with the cluster of health and human service agencies and their partners within the District government and with community service providers.

**2 General Requirements**

In order to achieve the complex and ambitious human services modernization effort employing enterprise application and system integration technologies, the District requires the services of skilled technologists and project management staff to augment District staff in completing specific tasks and milestones within an overall project schedule developed and maintained.

OCTO/HSMP has a need for an ACEDS Technical Project Manager to oversee the day-to-day management of the DHS/IMA ACEDS upgrade or replacement project. The ACEDS Project

Manager must have extensive high level project management experience in a custom development or system integration environment. The ACEDS Project Manager is responsible for assuring the creation and monitoring progress the ACEDS Project, including cost and staffing projections, and for managing all aspects of the projects' task fulfillment including monitoring performance against milestones and cost projections, completion of milestones and management of completion of documents and output in fulfillment of project tasks.

The person serving under this contract will be expected to be highly skilled professionals capable of working collaboratively within an integrated team with limited supervision to achieve the stated tasks and goals of the program or specific sub-projects. Qualified person must have experience in working in a disciplined development environment.

The preferred candidate will be experienced with a broad range of information system technologies. Candidate preferred with background in managing technology development projects involving custom development and implementation of standard industry applications within a complex, overlapping business processes. Experience in government sector technology strategies involving enterprise-wide integration planning architectures is preferred. Experience in the health, social services, education, Courts, and justice systems services and information system environment is highly preferred.

Contractor agrees to assure availability of staff to support the project timelines. Contractor will provide advance notice of any planned change in personnel on the contract. Replacement personnel must be interviewed and approved by the District.

### **3 Specific Requirements:**

OCTO requires the services of a consultant under this procurement. Specific expertise and general role description follows:

#### **3.1 ACEDS Project Manager**

The Contractor shall lead the Project Management team to assure business outcomes and business goals are defined. The responsibilities will specifically include the following:

- 3.1.1 Complete award of vendor contract
- 3.1.2 Work with vendor develop project vision document and initial work plan
- 3.1.3 Review vendors detailed work plan for the ACEDS project and integrate into HSMP master plan as required
- 3.1.4 Provide project management oversight for developing documentation of current system (as - is processes), documentation of future requirements (to-be processes), documentation of discrepancies between as-is and to-be processes (gap analysis) and the development of "future state" Concept of Operations (ConOps).
- 3.1.5 Provide project management oversight for development of feasibility assessments to determine the best approach for achieving system improvement objectives, considering the existing system and other available system alternatives.
- 3.1.6 Work with vendor to develop cost/benefit analysis methodology they intend to follow and provided evidence that they will complete the following:

- 3.1.6.1 Identify costs and benefits
- 3.1.6.2 Develop draft Cost/benefits Analysis
- 3.1.6.3 Finalize Cost/benefits Analysis
- 3.1.7 Work with vendor to develop project budgeting process and identify that it will include the following:
  - 3.1.7.1 Develop estimated schedule
  - 3.1.7.2 Assign costs to each requirement
  - 3.1.7.3 Identify major milestones
  - 3.1.7.4 Finalize Project Budget
- 3.1.8 Work with vendor to develop cost allocation methodology they intend to follow and provided evidence that they will complete the following:
  - 3.1.8.1 Define cost allocation methodology
  - 3.1.8.2 Assign costs to funding streams
  - 3.1.8.3 Finalize Cost Allocation Plan
- 3.1.9 Oversee development of required Implementation Advanced Planning Document (IAPD) documentation to support requests for and approval of Federal matching funds
- 3.1.10 Oversee development of required Request for Proposal (RFP) documentation to support requests vendor acquisition for system upgrade/replacement
- 3.1.11 Identify and manage stakeholder expectations during all phases of the project lifecycle
- 3.1.12 Leads team to assure business outcomes and business goals are defined
- 3.1.13 Develops and maintains work breakdown structure
- 3.1.14 Creates deliverable list and manages review and modifications as required; Assure all deliverables receive proper sign-offs and approvals
- 3.1.15 Creates detailed staffing plan
- 3.1.16 Personally participates in vendor workshops as needed
- 3.1.17 Assures completion of Risk Plan for project in collaboration with the HSMP Risk Manager
- 3.1.18 Assures completion of Quality Assurance Plan for project in collaboration with the HSMP Quality Assurance Manager
- 3.1.19 Assures on-time / on budget delivery of ACEDS tasks and deliverables
- 3.1.20 Tracks hours weekly by task
- 3.1.21 Provide a weekly status report on ACEDS accomplishments, issues and concerns.
- 3.1.22 Provide weekly ACEDS cost and schedule variances to the Deputy CTO and HSMP program manager.
- 3.1.23 Monitors progress; identifies and reports risks, analyzes impacts and proposes mitigation strategies
- 3.1.24 Supports related project and task groups as time allows or priorities and deadlines require to assure maintenance of progress on project.
- 3.1.25 Prepares statements of work where and other official documents as requested
- 3.1.26 Assures good working relationships and high levels of communication among District staff, requirements teams, development team(s), Agency SMEs, PMO, and other vendors working on the project. Creates detailed budgets, hours and cost estimates; verifies actuals with projected levels

**4. Record retention:**

- 4.1 Electronic and paper documents, forms, survey instruments, background materials secured as part of this contract shall be considered the property of the District of Columbia.
- 4.2 Contractor shall periodically review these resource materials with the COTR and establish file and retention plans.
- 4.3 No later than fourteen (14) days before the closeout of the contract, the contractor shall review with the COTR all project-related materials and agree on a disposition plan for the contract closeout.

**5. Change in Personnel:**

- 5.1 Contractor shall notify the District no less than 30 days in advance of any proposed change in personnel associated with this contract. The District reserves the right to review, interview, and/or approve any proposed replacement candidates.

GOVERNMENT OF THE DISTRICT OF COLUMBIA  
OFFICE OF THE CHIEF FINANCIAL OFFICER  
OFFICE OF TAX AND REVENUE



**TAX CERTIFICATION AFFIDAVIT**

**THIS AFFIDAVIT IS TO BE COMPLETED ONLY BY THOSE WHO ARE REGISTERED TO CONDUCT BUSINESS IN THE DISTRICT OF COLUMBIA.**

Date: \_\_\_\_\_  
Name of Organization/Entity: \_\_\_\_\_  
Address: \_\_\_\_\_  
Business Telephone No.: \_\_\_\_\_  
Principal Officer:  
Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Soc. Sec. No.: \_\_\_\_\_  
Federal Identification No.: \_\_\_\_\_  
Contract No.: \_\_\_\_\_  
Unemployment Insurance Account No.: \_\_\_\_\_

I hereby certify that:

- 1. I have complied with the applicable tax filing and licensing requirements of the District of Columbia.
- 2. The following information is true and correct concerning tax compliance for the following taxes for the past five (5) years:

	Current	Not Current	Not Applicable
District: Sales and Use	( )	( )	( )
Employer Withholding	( )	( )	( )
Ball Park Fee	( )	( )	( )
Corporation Franchise	( )	( )	( )
Unincorporated Franchise	( )	( )	( )
Personal Property	( )	( )	( )
Real Property	( )	( )	( )
Individual Income	( )	( )	( )

**The Office of Tax and Revenue is hereby authorized to verify the above information with the appropriate government authorities. The penalty for making false statements is a fine not to exceed \$5,000.00, imprisonment for not more than 180 days, or both, as prescribed by D.C. Official Code § 47-4106.**

**This affidavit must be notarized and becomes void if not submitted within 90 days of the date notarized.**

\_\_\_\_\_  
Signature of Authorizing Agent Title

\_\_\_\_\_  
Print Name

Notary: DISTRICT OF COLUMBIA, ss:

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_ Month and Year

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

# Attachment C Sample Resume'

## Candidate 1

### EDUCATION

**MIDWAY SCHOOL OF BUSINESS** - Chicago, IL  
**Master of Business Administration - Finance and Strategic Management** - June 2001

- Dean's Honor List
- Active member of Management Consulting, Corporate Management and Strategy, and High Tech Clubs.

**ANDERSEN COLLEGE** - Boston, MA  
**Bachelor of Arts in Physics (Cum Laude)** - June 1996

- Andersen College Scholarship for academic distinction; Dean's List all semesters
- Violinist in Andersen College Symphony
- Physics tutor for Bureau of Study Counsel; active participant in Habitat for Humanity
- Completed dissertation in the field of condensed matter theory

### EXPERIENCE

**SMART BROTHERS** - New York, NY  
**Technology Project Manager - Investment Banking** - June 1997 - July 1999

- Managed project teams to develop profit and loss systems for Proprietary Trading group
- Promoted to project leadership role in two years, well ahead of department average of four
- Developed an original mathematical algorithm for trading processing module, improving performance by 1200%
- Led team of six analysts in firmwide project to reengineer loan syndicate trading flows in firm's largest technology project of 1999. Recommendations established new firmwide standard for real-time trade processing
- Appointed lead developer of interest accrual team after just three months in department. Initiated and designed project to create customized, improved interest accrual and P&L applications for fixed income controllers
- Selected to work on high-profile project to reengineer corporate bond trading P&L system. Reduced overnight processing time from six hours to 20 minutes and improved desktop application speed by 350%
- Devoted 20-25 hours a month to instructing junior members of the team in interest accrual and trading

**FINANCIAL TECHNOLOGY GROUP** - New York, NY  
**Analyst** - June 1996 - May 1997

- Developed cutting-edge analytic software for use by Wall Street traders
- Worked on a daily basis with clients to create and implement customized strategic software solution for equity traders. Helped create and deliver extensive training program for clients
- Initiated, created, and documented new firmwide standard for software module development

**References (Three):** (Shall be provided to be considered.)



## INSTRUCTIONS

### GENERAL INSTRUCTIONS:

1. This form shall be generated to rate the performance of any contractor, provider, or supplier of goods and services to the District of Columbia.
2. The performance shall be summarized in the comments blocks included on the front of this form by checking the appropriate rating block, and adding any additional comments.
3. If there is not enough space to provide additional comments, please provide the comments on a separate sheet and attach that sheet to the form..
4. Please complete and transmit the attached form to your Agency Chief Contracting Officer in the Office of Contracting and Procurement (OCP), no less than three (3) weeks from the date that a contract ends; or the final delivery and receipt of goods and services pursuant to a contract; or upon the specific request of a representative of the Office of Contracting and Procurement.
5. Please evaluate the performance of the contractor in each area requested checking the appropriate block on the performance evaluation form in accordance with the Rating Schedule listed below:

### RATING SCHEDULE

- |     |                |   |
|-----|----------------|---|
| (0) | UNSATISFACTORY | The performance was substandard, and does not meet most contractual requirements. The contractual performance contained serious compliance problems for which the contractor's corrective actions appear or were ineffective.   |
| (1) | POOR           | The performance was simply marginal, and just barely met the contractual requirements. There are, or were, deficiencies in the overall performance that the contractor needs to address. Generally, there were several concerns with the contractor's performance, quality and service.   |
| (2) | SATISFACTORY   | The performance acceptably meets or met the contractual requirements. The performance was timely, in compliance with the contractual requirements. Generally, there were a few minor difficulties or problems for which corrective action were undertaken by the contractor and were successful.  |
| (3) | GOOD           | The performance on this contract was more than satisfactory and exceeded some of the contractual requirements. The performance was more than timely and the quality of service above compliance with the requirement. Generally, there was good satisfaction and happiness with the contractor performance, quality, and service.   |
| (4) | VERY GOOD      | The performance met and exceeded most of the contractual requirements, to the benefit of the government, resulting in a high standard of quality, timeliness, and overall customer satisfaction.. There were minimal difficulties with this contract for which all corrective actions undertaken by the contractor were met and fully implemented by the contractor.  |
| (5) | OUTSTANDING    | The performance of the contractor <i>ALWAYS</i> exceeds the contractual requirements, and was reflected by a continued pattern of an exceptional quality goods (or service, or work product); a continued pattern of advance delivery of goods or completion of services; a continued patterned of always performing at or below budget costs; and an unusual pattern of responsiveness to customer concerns; and an exceptionally high standard of demonstrated technical excellence. There were no contractor difficulties with this contract for which corrective action was required. |
6. A written, detailed narrative SHALL be provided to support and sustain all ratings of UNSATISFACTORY or OUTSTANDING. Please attach additional sheets, if needed.

### SPECIFIC INSTRUCTIONS: (All items *MUST* be completed):

- Block 1. Insert the assigned, official contract number of the contract.
- Block 2. Enter the name, address, telephone and facsimile numbers, and the name of the point of contact of the contractor.
- Block 3. Enter the name, address, and telephone, facsimile and e-mail numbers of the Contract Administrator (CA) / Contracting Officer Technical Representative (COTR).
- Block 4. Enter the appropriate classification information on the contract, or purchase order. Check all that apply.
- Block 5. Enter the contract date of award.
- Block 6. Enter the contractor 's federal tax identification number that is listed in or on the contract document.
- Block 7. Enter a brief statement proving a caption or description of the nature of the contract.
- Block 8. Enter the name, address, and telephone and fax numbers of the Contract Monitor, or person completing this evaluation, if other than the CA/COTR.
- Block 9. Enter the initial, or agreed upon, price of the contract as listed in the contract or purchase order, exclusive of all modifications.
- Block 10. Enter the final cost of the contract, or what has been, or will be paid to the contractor, inclusive of all approved cost modifications.
- Block 11. Enter the actual stated contract period of the contract that is listed on the front of the contract document.
- Block 12. Enter the specific period for which the performance evaluation is being completed if the specific period is less the total period of the contract.
- Block 13. This item is intended to determine whether the contractor met, or is meeting, the specific requirements outlines in the scope of work that is listed in the contract.
- Block 14. This item is intended to determine the quality of the contractor goods, service, or work performance.
- Block 15. This item is intended to obtain an indication of the timeliness of performance. Ask the question: Did the contractor deliver or perform on time?
- Block 16. This item is intended to assess whether the customer believes the contractor is reliable enough to be used again by the District.
- Block 17. This item is intended evaluate how well the contractor interacted with the District. Was the contractor responsive, flexible, cooperative, and professional.
- Block 18. This item is intended to assess the contractor's consistency in submitting the complete documents for payment, and other administrative documents including compliance on obtaining adequate liability insurance coverage where that requirement is applicable.
- Block 19. This item is intended to ascertain whether the vendor demonstrated originality and resourcefulness in handling issues addressed in a more traditional manner.
- Block 20. This item is intended to evaluate the contractor complied with the stated, or negotiated, contract cost.
- Block 21. This item addresses the extent, effectiveness, and overall management capability of the contractor. (Primarily in service, consulting and construction contracts.)
- Block 22. This item addresses the extent to which the contractor met compliance requirements for a safe work site. (Primarily applicable in construction contracts.)
- Block 23. This item addresses the extent to which the contractor met compliance requirements for labor standards and laws.
- Block 24. This item is intended to evaluate whether the facilities that are provided by the contractor to the District met requirements, including whether the facilities were clean, and safe; and met all District housing and building code requirements, or had a Certificate of Occupancy, where applicable.
- Block 25. Provide an OVERALL PERFORMANCE RATING assessing on the contractor's performance. The rating must be consistent with the prior ratings.
- Block 26. The Evaluator completing this performance evaluation shall sign and enter the date of signature.
- Block 27. The Contracting Officer shall review, and shall sign and enter the date of signature.