REQUEST FOR PROPOSALS
Sacramento Metropolitan Air Quality Management District

System Integration (Software) Project Management
RFP No. 2015-028

1. Introduction

The Sacramento Metropolitan Air Quality Management District (SMAQMD or District) requests proposals for the following purpose according to terms and conditions attached. In the preparation of this Request for Proposals (RFP) the words "Proposer", "Contractor", “Respondent” and "Consultant" are used interchangeably.

The purpose of this RFP is to solicit bids from qualified firms to provide Project Management services. The District is initiating several software implementations including SharePoint, Skype for Business, an ERP Financial System and an Enterprise Application to manage the District’s various Lines of Business. The District is seeking a firm to provide Project Management services to support and represent the District’s interest in the various implementations with selected application/implementation vendors as outlined in Attachment #1, Scope of Work.

Note: The successful firm awarded the contract will be ineligible to bid on the District’s software application and/or implementation projects for the term of the contract.

Please see the following documents for additional background included as Attachment #7:

- System Integration Project presentation
- SharePoint Implementation RFP – Scope of Services

2. Background

About the District

The District is the local public agency responsible for development, implementation, monitoring and enforcement of air pollution control strategies in Sacramento County, including its incorporated cities. The mission of the District is to achieve clean air goals by leading the region in protecting public health and the environment through innovative and effective programs, community involvement, and public education.

The District is a California Special District that is governed by a 14-member Board of Directors comprised of five Sacramento County Supervisors, four members of the Sacramento City Council, one member representing each of the cities of Citrus Heights, Elk Grove, Folsom, and Rancho Cordova, and one member representing the cities of Galt and Isleton. The Board reviews and approves all District rules, programs and budgets.
The District is part of a larger area, called the Sacramento Federal Ozone Non-attainment Area (SFNA). The SFNA is designated by the Environmental Protection Agency (EPA) as a “severe” non-attainment area for the eight-hour ozone standard. In addition to the Sacramento Air District, the SFNA includes all or parts of four other air districts: El Dorado County Air Quality Management District, Feather River Air Quality Management District, Placer County Air Pollution Control District, and Yolo-Solano Air Quality Management District.

**District Information Technology**

The District Information Technology staff consists of a System Administrator and two Information Systems Analysts. The staff functions include network system, software, and backup installation, configuration, and support as well as end user support. The infrastructure consists of a primary site and a disaster recovery site. The infrastructure is built on a Dell blade system, Dell Compellent storage, Cisco routers, switches, and firewalls. The District primarily operates in a virtualized Windows environment (Windows 2008 R2 and 2012 R2) running in both VMWare and Hyper-V.

The District’s network is comprised of Microsoft Windows servers for file, email, and data administration. District staff utilizes desktop computers, laptops and tablets running on Microsoft Windows 7+ and use Microsoft Office 2010+ as the primary application suite.

The District operates several Microsoft Access databases for its stationary source programs and administration services, and a SQL database for its vehicle incentive and air monitoring programs. The District has licenses for the SharePoint 2013 platform, and the ability to move to 2016, but has not implemented SharePoint. An RFP for SharePoint implementation was recently released. An additional RFP is anticipated to be released in the near future to migrate the various databases to a single SQL database as a separate concurrent project to the SharePoint / Website project.

Staff currently use email and file servers as a means of collaboration and document management. Staff uses desktops for testing, updating, and posting web contents to AT&T’s web host for the public. The District is seeking a Microsoft SharePoint internet/intranet/extranet solution as the enterprise content management, project management, collaboration and communication tool that will serve as a centralized location for district-wide information sharing. The solution will reduce the redundancy of business/project documents, frequent email transfers, misallocation of network storage space and time spent in searching and identifying job related materials. Furthermore, the solution will increase visibility of the organization’s expert knowledge via portals designed to share information with affiliated consultants.

The District currently uses the Sacramento County’s financial system, referred to as COMPASS (SAP), for its general ledger and payables functions. The District is seeking a system with enhanced functionality to allow for more efficient Accounts Payable/Accounts Receivable reconciliations, as well as budget planning, fund and grant management capabilities. There are many processes performed manually using mainly spreadsheets that are resource intensive and limit effective reporting.
3. Contacts

All inquiries regarding this document must be directed to Veronica Ruvalcaba, Administrative Assistant, at vruvalcaba@airquality.org or 916-874-4830. All inquiries and responses, if any, will be posted on the District website at www.airquality.org.

4. Timeline

The following timeline will guide this RFP Process.

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>October 5, 2015</td>
<td>Release of RFP</td>
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<tr>
<td>October 14, 2015 by 4:00pm</td>
<td>Questions due to District</td>
</tr>
<tr>
<td>October 23, 2015 by 4:00pm</td>
<td>Proposals due to District</td>
</tr>
<tr>
<td>November 3, 2015</td>
<td>Interview of finalists (if necessary)</td>
</tr>
<tr>
<td>November 6, 2015</td>
<td>Selection of a Contractor</td>
</tr>
<tr>
<td>November 2015</td>
<td>Execution of a Contract</td>
</tr>
</tbody>
</table>

Please direct all questions to Veronica Ruvalcaba at vruvalcaba@airquality.org by October 14, 2015 by 4:00pm.

Filing of a protest may delay the award of a contract.

5. Deadline

Four (4) hardcopies and one (1) electronic copy of all responses to this RFP must be received at the District by: **4:00 p.m. on Friday, October 23, 2015.**

Mail the hardcopy responses to:

SMAQMD  
777 12th Street, Third Floor  
Sacramento, CA 95814  
Attn: Veronica Ruvalcaba

*Time critical – Please hand deliver*

Send the electronic responses to: Veronica Ruvalcaba at vruvalcaba@airquality.org

- No response will be accepted after the time and date indicated above
- All components of the proposal are mandatory
- Failure to include all requested information may result in rejection
- Minor or inconsequential deviations may be waived
What to Include In the RFP Response

6. Response Document

The District’s goal in this RFP process is to identify the respondent with the experience, resources and qualifications to provide cost-effective services as described in Attachment #1, Scope of Services. RFP responses must include a separate written document prepared in narrative form, accompanied by the required attachments listed under Section 17. The proposal must address Sections 7-16 below and responses to Sections 9-16 must not exceed 20 pages in length excluding attachments. Bios and resumes for staff in response to Section 13 can be included as an attachment. Submittal of a proposal constitutes an agreement to all provisions and conditions set forth in this RFP. Information submitted will not be treated as confidential and may be released after the District selects a respondent if requested by any member of the public.

7. Cover Letter

Provide a cover letter that includes the name, address, telephone and fax numbers of the firm, the name of the contact person for the proposal, and the signature of the person or persons authorized to represent the firm. Submission of the proposal will be considered to be a binding commitment (firm offer) by the Contractor to provide the proposed services by the identified personnel at the specified project cost.

8. Table of Contents

Include a Table of Contents that clearly identifies the material contained in the proposal by section and page number.

9. Summary of Project Approach

State the overall approach to the project and objectives. Demonstrate a clear understanding of the project goal. Describe the different project management methodologies the firm utilizes, and which methodology the firm believes would be most applicable for this project.

10. Project Organization

Describe the proposed management structure, project monitoring procedures, organization of the contracting group, and facilities available. Provide an explanation, examples, and experience supporting the proposed structure.

11. District Resources

Describe any District services and staff resources, materials and information needed to supplement contractor activities to achieve the identified objectives.
12. Qualifications

Describe in detail the duration and extent of the firm’s experience as it relates to providing the required services. Discuss the applicability of background experience to this RFP. List previous projects prepared by the firm that are of similar nature to the work described in Attachment #1, Scope of Services. Include information on the length of time that the firm has been in business and describe the capabilities of the firm as it relates to the required services.

13. Staff Experience and Expertise

Identify the person(s) who will perform the majority of work on this contract and describe their relevant qualifications and experience. This must include: academic background, job history, length of time with firm, position held within the firm and any other pertinent information. Provide a summary of similar work they have previously performed. Describe the responsibilities and capacity of the technical personnel involved. List the amount of time each person will spend on each task of the project. Staff bios and resumes may be included as an attachment.

Substitution of key personnel will not be permitted without prior written approval of the District.

14. Subcontractors

If subcontractors are to be used, identify each of them in the proposal. Describe the work to be performed by subcontractors and the number of hours worked as a percentage of the total project hours by task. Provide a list of their assigned staff, their qualifications, and their relationship to project management, schedule, and cost by task.

15. References

Please provide three references, excluding the District, for whom the firm provided similar or comparable services during the last 5 years and a description of the services provided. The services must demonstrate the firm’s ability to meet the District’s needs as described within this RFP. The response must include: contact’s name, address, phone number, email address, date and description of services. (See Attachment #2, References)

References are not required for subcontractors, but are required for each firm when more than one firm is partnering for the proposal. If the firm is unable to provide three references, state the reason and the District will determine whether the number of references submitted is sufficient under the circumstances.

All three references will need to complete a reference survey provided to them via electronic mail. If the District does not receive their response by the given due date, the District will only send one reminder to the references to complete the survey. The firm will be marked down if all reference surveys are not received.

The District may contact references at any time, either before or after a respondent is selected. The District may reverse the selection decision and award the contract to another respondent based upon a post-award reference check.
16. **Rate for Services**

Provide the costs, including hourly rates for proposed resources, associated with completing the services as described in **Attachment #1**, Scope of Services. The District will not pay any fees or deposits prior to work completion.

17. **Additional Requirements**

All respondents must complete:

- A. **Attachment #3**, Debarment and Licensing Certification Form
- B. **Attachment #4**, Assurance and Certification
- C. **Attachment #5**, Declaration of Campaign Contribution

**Evaluation Criteria and Selection Process**

18. **District Discretion**

The District reserves the right, without limitation, to reject any and all proposals received, to waive any minor informality or irregularity in any proposal, or to cancel awarding of the contract and advertise for new proposals, all as the public good may require.

19. **Contract Team - Evaluation**

The respondents and RFP responses will be evaluated by a committee that will include District staff members and may include individuals outside the District (Contract Team).

20. **Woman/Minority/Disabled Veteran-Owned Business Enterprises**

It is the policy of the District to provide equal opportunities for all persons without regard to race, religion, creed, color, national origin, ancestry, disability, medical condition, marital status, gender, age or sexual orientation. It is also District policy to encourage participation of Minority and Women Owned Business Enterprises in the bidding process.

To the extent that any conflict exists between this policy and any requirements imposed by federal and state law relating to participation in a contract by a certified MBE/WBE/DVBE as a condition of receipt of federal and state funds, the federal or state requirement will prevail.

21. **Disadvantaged Business Enterprise (DBE)**

The successful respondent may not discriminate on the basis of race, color, national origin, or sex in the award and performance of subcontracts. In addition, the District encourages the participation of DBEs as defined in Title 49, Code of Federal Regulations part 26 (49 CFR 26) in the performance of contracts financed in whole or in part with Federal Transportation funds. If this project is funded by Federal Transportation Funds, this project is subject to 49 CFR 26 entitled “Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs.”
Federal DBE regulations require the District to collect data regarding work performed by DBEs. While the District may also set a “DBE Availability Advisory Percentage,” meeting this percentage is not an eligibility requirement for award of this Contract. However, if 49 CFR 26 is triggered, the successful respondent will be required to report on how much, if any, work required under the contract is performed by DBEs. (See Attachment #6, Sample Contract)

22. Evaluation Criteria

Criteria for evaluating RFP written responses and Presentation/Interviews is noted below. At the District’s discretion, presentations and interviews may be requested from at least the top two scoring respondents based on total points from the written responses.

<table>
<thead>
<tr>
<th>Written Proposals – Evaluation Criteria</th>
<th>Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Quality of Proposal</td>
<td>10</td>
</tr>
<tr>
<td>2 Overall Qualifications</td>
<td>20</td>
</tr>
<tr>
<td>3 Staff Experience &amp; Expertise</td>
<td>20</td>
</tr>
<tr>
<td>4 Project Management Approach</td>
<td>25</td>
</tr>
<tr>
<td>5 References</td>
<td>10</td>
</tr>
<tr>
<td>6 Cost</td>
<td>15</td>
</tr>
<tr>
<td>Written Proposals Total</td>
<td>100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Presentation – Evaluation Criteria</th>
<th>Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Presentation/Interview</td>
<td>50</td>
</tr>
<tr>
<td>Presentation Total</td>
<td>50</td>
</tr>
<tr>
<td>Overall Total</td>
<td>150</td>
</tr>
</tbody>
</table>

The District may award the contract outright or may conduct follow-up negotiations with the highest-rated competitors to clarify or address elements in the vendors’ technical or cost proposals. If follow-up discussions are conducted, each vendor still in the competitive range will be given an opportunity to submit a final proposal revision. Requests for final proposal revisions will advise vendors that the final proposal revisions must be in writing and that the District intends to make the award without obtaining further revisions.

23. Award Notification

Both the successful and unsuccessful respondents will be notified in writing by the District. The District will attempt to notify all respondents by email on the same day. The Contract Administrator will retain documentation verifying the notification attempts.

24. Protest Procedure

The protest procedures allow unsuccessful respondents the opportunity to challenge the process prior to execution of a contract. Protestors must:
1. Submit a written notice to the Air Pollution Control Officer (APCO) of the intent to file a protest within 5 business days of the date that the District sends the award notice by email. The protest notice must be received in the District’s office by 5:00 p.m. on the 5th day.

2. Submit a written protest to the APCO within 10 business days of the date that respondents are notified of the award of contract. The written protest to APCO must be received in the District’s office by 5 o’clock p.m. on the 10th day.

3. The written protest must include a complete statement of the reason(s) for the protest. The protesting party must provide facts and evidence to support its claim. Protests will be reviewed and resolved by the APCO, or their designee, within 5 business days of receipt of the written protest, unless the APCO determines that additional time is necessary.

25. Appeal

If a protest filed under Section 24 is denied, the protester may appeal the APCO’s determination to the Board of Directors. The protestor must notify the Board Clerk (874-4803) of the intent to appeal within 5 business days of the date of the letter indicating the APCO’s resolution.

26. Limitations

This RFP does not commit the District to award a contract, to pay any costs incurred in the preparation of proposals, or to procure or contract for services or supplies. Costs for developing proposals are entirely the responsibility of the respondent and are not chargeable to the District. All proposals become the property of the District and will not be returned to the respondents.

27. Ambiguity, conflict or other errors

If a respondent discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the respondent should immediately notify the District of the error and request modification or clarification of the document. The District may modify the RFP prior to the deadline for proposals by the publication of the revision on its website.

Contract

28. Term of Contract

It is understood that the successful respondent will enter into a services contract with the District. The term of this Contract will commence upon full execution by both parties and terminates according to the date stipulated in the contract unless extended by mutual consent of the parties. Attachment #6 is District’s standard contract language, insurance requirements and DBE requirements.

It is anticipated that the term of the contract will last 30 to 36 months from the date of execution. The time allocation will vary depending on the stages of the various projects and will be jointly agreed upon by Contractor and the District on a month-to-month basis. It is anticipated to average between 10 and 30 hours per week over the term of the contract.
29. **Insurance**

Prior to execution of the contract, commencement of work or disbursement of District funds, the successful respondent or its insurance company must submit an original certificate of insurance and certified copies of required endorsement. Certificates of insurance must show that the coverage is in effect and meets the District’s minimum requirements. *(See Attachment #6, Sample Contract)*

30. **Payment**

The District will reimburse the successful respondent only for the successful respondent’s actual time and expenses incurred in the performance of the contract. The District will not under any circumstances reimburse the successful respondent for any commitments made by the successful respondent for services not yet performed or materials not yet received.

31. **Administration**

The successful respondent must carry out all elements of the contract to the satisfaction of the District.

32. **Statement of Corporation and Tax Payer Information**

Federal Income Tax Law requires the District to file information returns for “services rendered” by certain individuals and others. The code provides that the Taxpayer Identification Number of the “payment recipient” (contractor) must be furnished upon request to the “service recipient” (District).

In order to help the District comply with its reporting responsibilities and to protect contractor from withholding or penalty, the selected contractor will be required to complete a W-9 Form.
SCOPE OF SERVICES

System Integration (Software) Project Management

The District will be undertaking several system integration projects and requires a qualified Project Manager to represent the District in a project management capacity with the responsibility of working with each of the contractors retained by the District to implement the following projects:

1. SharePoint Implementation including design of new District website, development of automated work flows, content management, etc. (See Attachment #7, SharePoint Implementation RFP – Scope of Services)
2. Line of Business Enterprise application development and implementation, including consolidation of District databases
3. Implementation of an ERP Financial System
4. Incorporation of unified communications solutions (Skype for Business) into our email / VoIP systems

Reporting to the District’s Administrative Services Division Manager (ASD), the Project Manager will work directly with the contractor’s Implementation Teams for each of the above projects to ensure:

- Project activities are consistent with the project objectives and that objectives can be met with available resources;
- Adherence to all project plans;
- Projects are meeting targets, budgets and timelines, with appropriate reporting and evaluation; and,
- All project deliverables are finalized according to the timelines.

Additional duties:

- Develop an evaluation plan and conduct an orderly, systematic and incremental evaluation of the projects;
- Keep the ASD abreast of the status of each project by providing regular status reports and conducting status meetings;
- Advise the ASD on appropriate Change Management activities;
- Establish links for collaborative work and sharing information between consultants and District project teams and staff;
- Facilitate District staff efforts related to these projects, including coordination efforts of various steering committees and the Executive committee;
- Engage and ensure participation of all key stakeholders;
- Ensure and maintain effective and on-going communication with individuals and groups involved directly or indirectly in the project;
- Ensure timely preparation of information and other written documents/material as required for implementation of project activities;
- Provide support during “Current State and Future state” assessments around functionality and/or processes;
- Present new functionality, perform training, and collaborate with District staff about concerns.
- Engage in other project-related tasks as needed.
Attachment #2

REFERENCES

Respondents must provide references from three (3) organizations that are or have received similar services. A brief description of services rendered, in addition to name, address, telephone number and contact person must be provided. Proponents may include letters of reference with this attachment.

Reference #1:

Date of Service:
Name of Organization:
Address:
Phone:
Email:
Contact Person:
Description of Service:

Reference #2:

Date of Service:
Name of Organization:
Address:
Phone:
Email:
Contact Person:
Description of Service:

Reference #3:

Date of Service:
Name of Organization:
Address:
Phone:
Email:
Contact Person:
Description of Service:
DEBARMENT AND LICENSING CERTIFICATION FORM

To be completed by all bidders/respondents on SMAQMD contracts financed with Federal transportation funds.

The Bidder certifies that, neither the Bidder firm nor any owner, partner, director, officer, or principal of the Bidder, nor any person in a position with management responsibility or responsibility for administration of federal funds:

a) Is presently debarred, suspended, proposed for debarment, has had required licenses revoked or been declared ineligible, or voluntarily excluded from covered transactions by any federal or state department/agency;

b) Has within a three-year period preceding this certification been convicted of or had a civil judgement rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction or contract (federal, state or local); violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

c) Is presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph b) above; or

d) Has within a three-year period preceding this certification had one or more public transactions or contracts (federal, state, or local) terminated for cause or default.

The Bidder further certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department/agency.

Dated this __________ day of ______________, 20____

By

Authorized Signature of Bidder

Printed Name and Title

Bidder Firm Name & Type of Entity (Corp, Sole Proprietor, Partnership)

Address

City/State/Zip Code

Area Code/Telephone number and email address
Attachment #4

ASSURANCE AND CERTIFICATION

I, (We), the undersigned, as duly authorized representative(s) of the respondent agency, affirm that the information and statements contained within this proposal to the best of my (our) knowledge, are truthful and accurate, and further, that I (we) am (are) duly authorized to submit this proposal from the respondent agency to deliver services.

______________________________  _________________________
Signature                        Date

______________________________  _________________________
Signature                        Date
Attachment #5

DECLARATION OF CAMPAIGN CONTRIBUTIONS

Contractor to
Initial

__________ Contractor has declared that there were no contributions made to any member of the SMAQMD Board of Directors during the preceding 12 months that trigger Government Code section 84308.

__________ Contractor has made the following contributions to members of the SMAQMD Board

<table>
<thead>
<tr>
<th>Name of Board member</th>
<th>Date of Contribution</th>
<th>Amount of Contribution</th>
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Attachment #6

SAMPLE CONTRACT LANGUAGE

1.0 Recitals

2.0 Terms and Conditions

The parties agree to the terms and conditions listed below:

2.1 **Scope of Services:** Contractor will perform the services described in Exhibit A.

2.2 **Payments:** SMAQMD will make the payments outlined in Exhibit B to the Contractor so long as the Contractor is providing the services set forth in Exhibit A.

**LANGUAGE TO BE DETERMINED BASED UPON RFP RESPONSE**

A. **Invoices:** Payment will be on a reimbursement basis. Contractor will submit one original and one duplicate monthly invoice to SMAQMD in a SMAQMD-approved format.

1. The invoice must include an itemization of Contractor and subcontractor staff costs, including: name, position, work tasks, date of service, description of service or meeting topics, number of hours worked, rate per hour and total cost.

2. The invoice must also include appropriate documentation for all costs and expenses.

3. Invoices that do not contain the information required under this section are incomplete and will not be paid until complete information is submitted.

4. SMAQMD will authorize payment to Contractor no later than 30 calendar days after receipt of a completed invoice.

5. Contractor must submit the final invoice within 30 days of the Contract termination date.

B. **Invoicing Limitations:** The following restrictions limit SMAQMD’s obligation to pay invoices:

1. SMAQMD will reimburse Contractor only for Contractor’s approved costs. The Contractor must document these costs through invoices, receipts and other appropriate records. SMAQMD will not, under any circumstances, reimburse Contractor for any commitments made by Contractor for services not yet performed.
2. Contractor is solely responsible for payment to all vendors, subcontractors and consultants used in the performance of this Contract. It is not the intent of SMAQMD and Contractor to create third party beneficiary rights in these entities.

3. In the event Contractor fails to comply with any material provision of this Contract, SMAQMD may withhold payment until Contractor has corrected the noncompliance.

4. If this Contract involves media placements, Contractor may not retain commissions on media placements purchased for the benefit of SMAQMD. At the discretion of SMAQMD, the value of any commissions will be applied toward the purchase of additional SMAQMD media placement or discounted from the total bill. Contractor will be paid an hourly rate for media placement services as provided for in this Contract.

2.3 **Contract Term:** The term of this Contract will commence upon execution of this Contract and terminates ____________, unless extended by mutual consent of the parties.

2.4 **Applicable Laws/Choice of Law/Venue:** Contractor must observe and comply with all applicable laws and regulations. This Contract is executed in Sacramento County, California and is governed by the laws of the State of California. Any action arising out of this Contract must be filed in a state court or federal court located in Sacramento, California.

2.5 **Status of Contractor:** Contractor is an independent contractor, and no relationship of employer-employee exists between SMAQMD and Contractor, or Contractor’s employees, subcontractors, or consultants. Accordingly, Contractor, its employees, subcontractors and consultants do not have any of the entitlements of a SMAQMD employee.

A. **Direction and Control:** Contractor is subject to the control and direction of the APCO regarding the designation of tasks to be performed and the results to be accomplished under this Contract, but not the means, methods, or sequence used by Contractor for accomplishing the tasks and results.

B. **Direction of Third Parties:** If the Contractor employs any third persons, these persons will be under the exclusive control of Contractor. All terms of employment, including but not limited to hours, wages, working conditions, discipline, hiring, and discharging will be determined by Contractor.

C. **Right to Bind:** Neither the Contractor nor its employees, subcontractors or consultants have the right to act on behalf of SMAQMD in any capacity, or to bind SMAQMD to any obligation, and may not represent to any person that they have such authority.
D. **Taxes:** SMAQMD will not make any deductions or withholdings from the compensation paid to Contractor. Contractor must issue all forms required by federal and state laws for income and employment tax purposes for all of Contractor’s assigned personnel.

2.6 **Conflict of Interest:** No officer or employee of SMAQMD has any pecuniary interest, direct or indirect, in this Contract or the proceeds of the Contract. No officer or employee of Contractor may serve on SMAQMD’s governing body or hold any SMAQMD position which nominates, recommends, supervises or authorizes payment to Contractor.

2.7 **Form 700:** Check if SMAQMD has determined that this paragraph applies to Contractor.

Section 18730 of Title 2 of the California Code of Regulations (CCR), a regulation of the Fair Political Practices Commission (FPPC) requires that all persons that make, influence or participate in the award of contracts file a FPPC Form 700 with the Sacramento County Clerk's office through the contract period and that, when the contract period ends, that the persons file statements within 30 days after leaving office. SMAQMD has identified the following as designated filers: ____________________.

Copies of the required forms may be found at www.fppc.ca.gov. It is the Contractors sole responsibility to ensure compliance with Section 18730. SMAQMD will notify the County Clerk that the persons identified above have been added to our list of designated filers, and the County Clerk will send notices to the affected persons when annual statements are due. Contractor must provide its own contact information and not that of SMAQMD so that it receives the notices directly. The FPPC sets fines of $10 per day up to a maximum of $100 for failure to promptly file the forms, including Leaving Office forms. Persons who fail to timely file their Form 700 may be referred to the FPPC’s enforcement division (and in some cases to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine up to $5,000 per violation may be imposed.

2.8 **Nondiscrimination:**

A. **Requirements:** Contractor must not discriminate based on:

1. Color, race, creed, national origin, religion, sex, age, or physical or mental handicap in violation of Title VI of the Civil Rights Act of 1964 (42 U.S.C. Section 2000d) and the Americans with Disability Act of 1990 (42 U.S.C. Section 12101, et seq.) and their implementing regulations, or in violation of any other state or federal law;

2. Sexual orientation as determined by federal, state, or local laws and regulations.
B. **Prohibited Discrimination:** Prohibited discrimination under this Contract means disparate treatment on the basis of race, color, creed, national origin or sexual orientation. Discrimination includes, but is not limited to:

1. Denying persons any service or benefit which is different, or is provided in a different manner or at a different time from that provided to other participants under this Contract;

2. Subjecting persons to segregation or separate treatment in any matter related to the receipt of services;

3. Restricting persons in any way from the enjoyment of any advantage or privilege enjoyed by others under this Contract;

4. Treating persons differently from others in determining whether they satisfy any admission, enrollment quota, eligibility, membership, or other requirement that individuals must meet in order to be provided any service or benefit under this Contract;

5. Assigning times or places for the provision of services on the basis of race, color, creed, national origin or sexual orientation of the persons to be served.

2.9 **Indemnification:**

A. **Scope:** Contractor will indemnify and defend SMAQMD, its officers, agents, and employees from any and all liabilities of any kind that arise from any negligent or wrongful acts or omissions of Contractor in his/her performance of this Contract. SMAQMD will indemnify and defend Contractor, its board, officers, agents, and employees, from any and all liabilities of any kind that arise from any negligent or wrongful acts or omissions of SMAQMD in its performance of this Contract.

B. **Counsel:** Contractor will use counsel reasonably acceptable to SMAQMD in carrying out its obligations under this section. The provisions of this section will survive the expiration or early termination of this Contract.

2.10 **Waiver of Claims:** Contractor waives any claims against SMAQMD, its officers, agents, employees or volunteers from damage or loss caused by:

A. Any suit or proceeding directly or indirectly attacking the validity of this Contract, or any part of this Contract.

B. Any judgment or award: (i) declaring this Contract, or any part of this Contract, either void or voidable, or (ii) delaying the performance of any part of this Contract.
2.11 Insurance:

A. **Insurance Requirement:** Contractor will maintain insurance to cover its operations throughout this Contract and any Contract extensions.
   
   1. The insurance must meet the requirements in Exhibit C.
   
   2. Any insurance or self-insurance maintained by SMAQMD will apply in excess of, and not contribute to, insurance maintained by Contractor.
   
   3. Contractor will give SMAQMD 30 days written notice prior to canceling or modifying the insurance obtained under this section. SMAQMD may object to the cancellation or modification within 15 days of receiving the notice. If SMAQMD objects, it may demand the relief specified in paragraph 2.17 (B).
   
   4. This section does not limit Contractor’s indemnification obligation in Section 2.9.

B. **Involuntary Policy Modifications:** If Contractor’s insurer modifies its insurance in any manner that affects the specifications in Exhibit C, Contractor must notify SMAQMD within 96 hours of the modification. SMAQMD may demand that Contractor obtain additional coverage sufficient to comply with the specifications in Exhibit C, or may terminate this Contract as provided in section 2.17 (B).

2.12 Assignments: No performance required or payment due under this Contract may be subcontracted, delegated or assigned without the express written consent of SMAQMD.

2.13 Subcontracts: If the Contractor submitted the name of a subcontractor in the proposal or application for this Contract, SMAQMD’s approval of the Contract is also an approval of the use of the named subcontractor.

In the event that any part of this Contract is subcontracted, Contractor agrees to document the following affirmative steps for utilizing Minority Business Enterprises (MBE) or Women Owned Business Enterprises (WBE) as required by the Environmental Protection Agency:

A. Inclusion of MBEs and WBEs on solicitation lists.
B. Assure MBEs and WBEs are solicited once they are identified.
C. Where feasible, divide total requirements into smaller tasks to permit maximum MBE/WBE participation.
D. Where feasible, establish delivery schedules which will encourage MBE and WBE participation.
E. Encourage use of the services of the U.S. Department of Commerce’s Minority Business Development Agency (MBDA) and the U.S, Small Business Administration to identify MBEs and WBEs.

2.14 Successors: This Contract will bind the successors of SMAQMD and Contractor in the
same manner as if they were expressly named.

2.15 **Alteration:** No alteration or variation of the terms of this Contract is valid unless made in writing and signed by both parties.

2.16 **Recordkeeping:**

A. **Records:** Contractor will maintain all necessary records, books and accounts to verify that the Contract funds are used only for the purposes stated in this Contract.

B. **Audits:** SMAQMD may audit all expenditures made by the Contractor under this Contract. Contractor must ensure that SMAQMD staff have access, at all reasonable times, to the documents kept by Contractor in connection with all funds expended under this Contract.

C. **Duration:** Contractor must maintain these documents for 5 years after the termination of this Contract and any Contract extensions. At the end of the 5-year period, Contractor must either continue to maintain the documents or surrender the documents to SMAQMD – unless the APCO states, in writing, that Contractor may destroy documents.

2.17 **Termination:**

A. **30-day Notice Termination:** Either SMAQMD or Contractor may terminate this contract for any reason by giving the other party 30-days written notice. If this contract is terminated under this paragraph, SMAQMD may proceed with the work in any manner deemed proper by SMAQMD without recourse by Contractor, its officers, agents, employees or volunteers. Contractor will be paid for work performed up to the termination date.

B. **5-day Notice Termination:** SMAQMD, through its APCO, may terminate this Contract with 5 days written notice if Contractor fails to perform any of the terms and conditions of this Contract in the time and manner specified. If the Contract is terminated under this paragraph, SMAQMD may proceed with the work in any manner deemed proper by SMAQMD without recourse by Contractor, its officers, agents, employees or volunteers.

C. **Immediate Termination:** SMAQMD, through its APCO, may terminate or amend this Contract without prior notice if advised that funds are not available for this Contract or any portion of this Contract, or if funds are not specifically appropriated for this Contract in SMAQMD’s final budget for the term of this Contract and any extensions to the Contract. If SMAQMD terminates or amends this Contract under this paragraph, SMAQMD must serve notice of the action on the Contractor within two (2) working days.

D. **Subcontractor Termination:** SMAQMD may require Contractor to immediately terminate any subcontractor if SMAQMD, at its sole discretion, determines the
subcontractor is unacceptable.

2.18 Rights to Contracted Products:

A. All reports, research data, and every other work product of any kind or character arising from or relating to this Contract are the exclusive property of SMAQMD. SMAQMD may use these work products for any purpose whatsoever and has the sole right to the copyright or trademark for these work products.

B. Without limiting the foregoing, any intellectual property, including, but not limited to all material, information, data, methodologies, know-how and documents, of Contractor existing prior to date of work authorization, which Contractor incorporates or intend to incorporate into any work product delivered under any work authorization, must be disclosed in the work authorization in order to prevent the transfer of any rights to such intellectual property to SMAQMD.

2.19 Disputes:

A. APCO Decision: Any dispute under this Contract will be settled in a written decision by the APCO. The APCO must mail a copy of the decision to Contractor. Contractor is not excused from performance of this Contract while the APCO’s decision is pending.

B. Finality of the Decision and Exceptions: The APCO’s decision is final unless Contractor files a written appeal with the SMAQMD Board of Directors within 30 days from the date of the APCO’s decision. Any appeal must detail the basis of the appeal and contain copies of all documentation supporting Contractor’s position.

C. Appeals: The SMAQMD Board will hear the appeal at a public Board meeting. The Contractor may present testimony and evidence supporting its position at the meeting. Contractor and SMAQMD will perform all duties and obligations in accordance with the APCO’s decision pending final Board action. The decision of the Board is a final agency action and may be judicially appealed.

2.20 Waiver of Contract Provisions: Waiver by either party of any default, breach or condition precedent will not be construed as waiver of any other default, breach or condition precedent or right under this Contract.

2.21 Time: Time is of the essence with respect to attainment of the timely performance of tasks associated with this Contract.

2.22 Severability: If any provision of this Contract is held invalid or unenforceable, its invalidity or unenforceability will not affect any other provisions of this Contract, and this Contract will be construed and enforced as if such provision had not been included.
2.23 **Payments that contravene the law:** SMAQMD has no liability for payments that are found to contravene the law. Contractor will reimburse SMAQMD for any payments made by SMAQMD to Contractor and later determined to contravene federal, state or local laws and regulations.

2.24 **Contingency Clause:** This contract is subject to any contingency clauses stated in Exhibit B – Payment Terms and Conditions.

2.25 **Special Provisions – Congestion Management and Air Quality (CMAQ) Funds:**

A. **Applicability:** _____ (District staff to initial if CMAQ funds will be used.) This section applies only if the Contractor will receive CMAQ funds. Inclusion of this section is a requirement of the SMAQMD Disadvantaged Business Enterprise (DBE) Program for CMAQ-funded projects. See Contract, Exhibit D.

The SMAQMD encourages the participation of DBEs as defined in Title 49, Code of Federal Regulations part 26 (49 CFR 26) in the performance of contracts financed in whole or in part with Federal Funds.

B. **Provisions:** If this project is funded by federal funds, this project is subject to 49 CFR 26 entitled “Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs.” If all or some of the funds paid to Contractor are CMAQ funds, the following additional contract terms apply:

i. **Subcontractor Payments:** The Contractor will pay each subcontractor for satisfactory performance no later than 10 days from the receipt of each payment the Contractor receives from SMAQMD. Any delay or postponement of payment from this time frame may occur only for good cause following written approval of SMAQMD. This paragraph applies to both Disadvantaged Business Enterprises (DBE) and nonDBE subcontractors.

ii. **Retainage Releases:** The Contractor will release retainage payments to each subcontractor within 30 days after the subcontractor’s work is satisfactorily completed. Any delay or postponement of payment from this time frame may occur only for good cause following written approval of SMAQMD. This paragraph applies to both Disadvantaged Business Enterprises (DBE) and nonDBE subcontractors.
iii. **Nondiscrimination:** The Contractor or subcontractor will not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The Contractor will carry out applicable requirements of 49 CFR part 26 in the award and administration of Department of Transportation assisted contracts. Failure by the Contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as District deems appropriate. If there is a conflict between the provisions of this paragraph and section 2.4, this paragraph will control.

2.26 **Headings:** The headings of the various sections of this Contract are intended solely for convenience of reference and are not intended to explain, modify, or place any interpretation upon any of the provisions of this Contract.

2.27 **Counterparts:** This Contract may be executed in multiple counterparts, each of which will constitute an original, and all of which taken together will constitute one and the same instrument.

2.28 **Amendments Required by Federal, State or Local/Regional Agencies:** If the FTA, FHWA, Caltrans, EPA, ARB, SACOG or any other federal or state agency having jurisdiction, requires a change to the terms of this Contract, the parties will amend this Contract as necessary, or will terminate it with 30-days notice.

2.29 **Entire Agreement:** This Contract constitutes the entire agreement between SMAQMD and Contractor. Both parties revoke all prior or contemporaneous oral or written agreements between them that are inconsistent with this Contract. In the event of a dispute between the parties regarding the Contract, this Contract will be deemed to have been drafted by the parties in equal parts so that no presumptions or inferences concerning its terms or interpretation may be construed against any party to this Contract. This Contract consists of:

A. Exhibit A – Scope of Services
B. Exhibit B – Payment Terms and Conditions
C. Exhibit C – Insurance Requirements
D. Exhibit D – DBE Requirements

2.30 **Communications:** Any communication between the parties that is required under the provisions of this Contract must be in writing, and be either: (i) personally delivered, (ii) sent by prepaid, certified first class mail, return receipt requested, or (iii) sent by facsimile (provided confirmation of delivery is obtained at the time of transmission). Communications must be addressed to the parties as follows:
A. **Change of Address:** Either party may change the address for service by giving 15 days advance written notice to the other party.

B. **Effective Date:** All notices will be effective upon receipt and will be deemed received: (i) upon delivery, if personally delivered, (ii) on the 5th day following deposit in the mail, if sent by certified mail, or (iii) upon the date stated in the facsimile delivery confirmation, if sent by facsimile.

2.31 **Contract Manager:** ______________ is SMAQMD’s named Contract Manager for this Contract. It is the responsibility of the Contract Manager to: 1) verify compliance with the terms and conditions of the contract, 2) determine that the work has been completed, 3) ensure that funding is available to pay approved invoices, and 4) approve all invoices under the Contract. The APCO may redesignate a new Contract Manager.

2.32 **Authority to Bind:** The persons signing on behalf of the parties to this Contract warrant that they have the legal authority to execute the Contract.
Exhibit A
Scope of Services

See Attachment #1 of this RFP
Exhibit B
Payment Schedule and Terms

Sample

1. Contractor must perform and complete all work required under this Contract in a professional manner and in accordance with the professional standards observed by competent practitioners of the profession in which Contractor, its subcontractors and agents, are engaged.

2. The APCO has the sole discretion to determine whether Contractor has successfully completed the tasks.

3. It is understood by Contractor that $________ is the maximum budgeted for this Contract.

4. Payment will be made monthly, on a reimbursement basis, upon execution of this Contract. Contractor must submit one original and one duplicate invoice in a format acceptable to SMAQMD, at the completion of each month, and no later than the 10th of the following month.

5. Invoices must include the name of the person performing the work with their pay rate and the time spent on the task.

6. Contractor will not be paid for travel and expenses under this Contract.

7. It is the responsibility of the Contractor to successfully complete the requested services as outlined in Exhibit A, acquisition of materials and supplies, while remaining within the approved budget.
Exhibit C
Insurance Requirements

Without limiting Contractor’s indemnification, Contractor will procure and maintain for the duration of the contract, insurance against claims for injuries or persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives or employees. SMAQMD will retain the right at any time to review the coverage, form, and amount of the insurance required hereby. If, in the opinion of the SMAQMD’s Liability & Property Insurance Office, the insurance provisions in these requirements do not provide adequate protection for SMAQMD and for members of the public, SMAQMD may require Contractor to obtain insurance sufficient in coverage, form and amount to provide adequate protection. SMAQMD’s requirement must be reasonable but will be imposed to assure protection from and against the kind and extent of risks that exist at the time a change in insurance is required.

Verification of Coverage
Contractor will furnish SMAQMD with certificates evidencing coverage required above. Certified copies of required endorsements must be attached to provided certificates. All certificates are to be received and approved by SMAQMD before work commences. SMAQMD reserves the right to require that Contractor provide complete, certified copies of any policy of insurance offered in compliance with these specifications. As an alternative to insurance certificates, the Contractor’s insurer may voluntarily provide complete, certified copies of all required insurance policies, including endorsements, affecting the coverage required by these specifications.

Minimum Limits of Insurance
Contractor will maintain limits no less than:
1. General Liability: $1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit will apply separately to this project/location or the general aggregate limit will be twice the required occurrence limit.
2. Automobile Liability: $1,000,000 per accident for bodily injury and property damage.
3. Workers’ Compensation: Statutory
4. Employer’s Liability: $1,000,000 per accident for bodily injury or disease.

Deductible and Self-Insured Retention
Any deductibles or self-insured retention must be declared to and approved by SMAQMD. At the option of SMAQMD, either: the insurer will reduce or eliminate such deductibles or self-insured retention as respects SMAQMD, its officers, officials, employees and volunteers; or the Contractor will procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.
Other Insurance Provisions
The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. SMAQMD, its officers, officials, employees, agents and volunteers are to be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of the Contractor; products and completed operations of the Contractor; or premises owned, occupied, or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage may not contain special limitations on the scope of protection afforded to SMAQMD, its officers, officials, employees, agents or volunteers.

2. For any claims related to this project, the Contractor's insurance coverage will be primary insurance as respects SMAQMD, its officers, officials, employees, agents and volunteers. Any insurance or self-insurance maintained by SMAQMD, its officers, officials, employees, agents or volunteers will be excess of the Contractor's insurance and will not contribute to it.

3. Any failure to comply with reporting or other provisions of the policies including breaches of warranties will not affect coverage provided to SMAQMD, its officers, official, employees, agents or volunteers.

4. The Contractor's insurance will apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

Acceptability of Insurers
Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII. SMAQMD may waive or alter this requirement, or accept self-insurance in lieu of any required policy of insurance if, in the opinion of the Claims Manager (Special SMAQMD Risk Management Authority) or SMAQMD Counsel, the interests of SMAQMD and the general public are adequately protected.
Exhibit D
Disadvantaged Business Enterprises Requirements

I. DBE Participation Information
(Bidder/Respondent must check Option 1 or Option 2 below)

______________ Option 1 – No certified DBE participation proposed under this Contract.

______________ Option 2 – It is proposed that the following DBE(s) be used on this Contract

<table>
<thead>
<tr>
<th>Name of Certified DBE</th>
<th>DBE Certification No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
<tr>
<td>DBE Address</td>
<td>DBE Telephone No.</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>DBE E-Mail Address</td>
<td>DBE E-Mail Address</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Capacity of DBE (e.g., contractor, subcontractor, vendor)</th>
<th>$ Amount DBE Participation</th>
</tr>
</thead>
</table>

| Description of services or material to be provided by DBE |

Submitted By:

Signature ___________________________ Date ___________________________

Print Name and Title ___________________________

Name of Bidder, if different than signatory ___________________________
II. Identifying DBEs

Bidders shall be fully informed in respect the requirements of the DBE Regulations. The DBE Regulations in their entirety are incorporated herein by this reference. The regulations include the following information:

A. A DBE must be a small business concern as defined pursuant to Section 3 of U.S. Small Business Act and relevant regulations promulgated pursuant thereto.

B. A DBE may participate as a prime contractor, subcontractor, joint venture partner with a prime or subcontractor, vendor of material or supplies or as a trucking company.

C. A DBE joint venture partner must be responsible for specific contract items of work, or clearly defined portions thereof. Responsibility means actually performing, managing and supervising the work with its own forces. The DBE joint venture partner must share in the capital contributions, control, managements, risks and profits of the joint venture commensurate with its ownership interest.

D. A DBE must perform a commercially useful function, i.e., must be responsible for the execution of a SMAQMD element of the work and must carry out its responsibility by actually performing, managing and supervising the work.

E. DBEs must be certified by the California Unified Certification Program (CUCP). Listings of DBEs certified by the CUCP are available from the following sources:


2) The Caltran’s DBE Directory. This Directory may be obtained from the Department of Transportation, Materiel Operations Branch, Publication Distribution Unit, 1900 Royal Oaks Drive, Sacramento, California 95815, Telephone: (916) 445-3520.

F. When Reporting DBE participation, bidders may count the cost of materials or supplies purchased from DBEs as follows:

1) If the materials or supplies are obtained from a DBE manufacturer, 100 percent of the cost of the materials or supplies will count toward DBE participation. A DBE manufacturer is a firm that operates or maintains a factory or establishment that produces, on the premises, the materials, supplies, articles, or equipment required under the contract and of the general character described by the specifications.

2) If the materials or supplies are purchased from a DBE regular dealer, count 60 percent of the cost of the materials or supplies. A DBE regular dealer is a firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials, supplies, articles or equipment of the general character described by the specifications and required under the contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. To be a DBE regular dealer, the firm must be an established, regular business that engages, as its principal business and under its own name, in the purchase and sale or lease of the products in question. A person may be a DBE regular dealer in such bulk items as petroleum products, steel, cement, gravel, stone, or asphalt without owning, operating, or maintaining a place of business as provided in this paragraph F.2. if the person owns and operates distribution equipment for the products. Any supplementing of regular dealers’ own distribution equipment shall be by a long-term lease agreement and not on an ad hoc or contract-by-contract basis. Packagers, brokers, manufacturers’ representatives, or other persons who arrange or expedite transactions are not DBE regular dealers within the meaning of this paragraph F.2.
3) If the DBE is neither a manufacturer nor a regular dealer, count only the entire amount of fees or commissions charged for assistance in the procurement of the materials and supplies, or fees or transportation charges for the delivery of materials or supplies required on a job site, provided the fees are reasonable and not excessive as compared with fees charged for similar services.

G. When reporting DBE participation, bidders may count the participation of DBE trucking companies as follows:
1) The DBE must be responsible for the management and supervision of the entire trucking operation for which it is responsible on a particular contract.
2) The DBE must itself own and operate at least one fully licensed, insured, and operational truck used on the contract.
3) The DBE receives credit for the total value of the transportation services it provides on the contract using trucks it owns, insures, and operates using drivers it employs.
4) The DBE may lease trucks from another DBE firm, including an owner-operator who is certified as a DBE. The DBE who leases trucks from another DBE receives credit for the total value of the transportation services the lessee DBE provides on the contract.
5) The DBE may also lease trucks from a non-DBE firm, including an owner-operator. The DBE who leases trucks from a non-DBE is entitled to credit only for the fee or commission it receives a result of the lease arrangement. The DBE does not receive credit for the total value of the transportation services provided by the lessee, since these services are not provided by a DBE.
6) For the purposes of this paragraph G, a lease must indicate that the DBE has exclusive use of and control over the truck. This does not preclude the leased truck from working for others during the term of the lease with the consent of the DBE, so long as the lease gives the DBE absolute priority for use of the leased truck. Leased trucks must display the name and identification number of the DBE.

H. Bidders are encouraged to use services offered by financial institutions owned and controlled by DBEs.
Attachment #7

SYSTEM INTEGRATION PROJECT PRESENTATION

SHAREPOINT IMPLEMENTATION RFP – SCOPE OF SERVICES
Systems Integration Project

Bidder’s Conference
October 1, 2015
Presentation Outline

- Introductions
- Systems Integration Assessment
- Current Issues
- Proposed Solutions
- Project Timelines
- Next Steps
- Submitted Questions
- Open Discussion
Assessment

Scope: Assess the District’s need for technology enhancement and automation, and make recommendations

- Interviewed over a dozen District staff including end users, IT personnel and management
- Reviewed internet/intranet and databases
- Documented the business case
- Researched the possible solutions
- Provided recommendations
MISSION: To achieve clean air goals by leading the region in protecting public health and the environment through

- innovative and effective programs
- dedicated staff
- community involvement, and public education
Business Case Conclusion

State of the Art system with automated and effective business processes would create ability to:

- Improve productivity and communication
- Direct more resources on developing innovative programs
- Better communicate with and serve the public via improved website and expanded use of social media
- More effectively plan operating and capital budgets
- Work using mobile devices
- Retain and attract talented staff
Current Issues

- Business processes/systems have not been updated to modern technological standards
- Losing experienced staff to retirement
- Most business processes are manual and paper intensive
- Operational data is maintained separately – fragmented, often redundant data entry, requires high maintenance
- Website provides only static content, lacks customer self-service options
- Fiscal planning/tracking is manual-intensive and primarily Excel spreadsheet driven
- Lack of effective mobile solutions for field staff
Welcome! Contact Us

The AQMD's mission is to achieve clean air and protect public health and the environment.

Highlights

Smoke-Related Health Statement (PDF)

The Sacramento region’s 21st Spare The Air season (PDF) began May 1. This year’s campaign features a special focus on educating the public about the dangerous health effects of air pollution. Poor air quality affects everyone, but sensitive groups including children, pregnant women, and older adults and the elderly are at greater risk. Sign up for Air Alert to get the daily air quality forecast, follow on Twitter at Twitter.com/AQMD or on Instagram at Instagram.com/SacramentoAQMD.

2015 - California’s Progress Toward Clean Air This report includes the latest local and statewide air quality data from 2014 and highlights achievements and challenges for air quality regulators.

EPA Finalizes Updates to Air Standard for Future Wood Heaters This EPA action will help reduce emissions from wood heaters in Sacramento County. Since almost 50 percent of PM2.5 pollution in the county comes from wood burning, all efforts to reduce those emissions are necessary. For more information on the new EPA standard, visit http://www2.epa.gov/residential-wood-heaters.

Fireplace Information Check out the District’s Fireplace Information page. You will find links to regulations and further details about the installation and use of fireplaces, wood stoves and pellet stoves in Sacramento County and the cities of Citrus Heights, Elk Grove, El Dorado, Folsom, Galt,无视, Rancho Cordova and Sacramento.
### Financial System

#### Hours & Expense Tracking

<table>
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<tr>
<th>RESOURCE</th>
<th>Initiation / Planning</th>
<th>Install / Development / Testing</th>
<th>Deployment</th>
<th>Operational / Maintenance</th>
<th>Total Hours</th>
<th>T &amp; L Expenses</th>
<th>T &amp; L Expenses - Capitalized</th>
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<td>$0.00</td>
</tr>
</tbody>
</table>

**TIP:** Use the Outline Symbols above and to the left to show hide project details.
Combination of Manual and automated systems.

Current Revenue Side Business

SMAQMD Manual System

Internal Billing Request

Billing

Staff submits request to billing, non-system generated

Programs

Manually update Project(s)/Revenue Budget in subsystem

Budget Forecast

Manually update Operating Budget in subsystem

Operating

Staff generates reports/downloads to determine available balance and enters into subsystem

Collection of Payment/Fee(s)

Staff manually updates subsystem for billing payment and revenues

Customer/Client

Mail or electronic collection

Sacramento County SAP System

General Ledger

Staff generates manual form to submit to County to update GL

System Batch Process to update

Reporting/Analysis

Staff generates reports and downloads to reconcile Operating Revenue Budget

Staff generates reports and downloads to reconcile Project(s) Revenue Budget

Manual Processes (Red)

Automated Process (Blue)
Assessment Recommendations

- Develop new internet and intranet sites
- Implement web enabled Lines-of-Business (LOB) application with a centralized database
- Implement an Enterprise Financial System
- Integrate LOB application with the Financial System
- Improve document management and control standards
- Establish automated process workflows
Proposed Solution

- Lines of Business
  - Finance
  - SharePoint
- Databases
- Content Management
- LOBs
  - Mobile Source, Asbestos
  - Stationary Source
  - Portable Equipment
  - Complaints, Violations
  - Wood Burning
  - LUTRAN projects
  - Air Monitoring
- Finance
- Collaboration
- Reports
- Permits
- Invoices
- Unified Communication: email, video, voice, IM, presence
- www.airquality.org
Focus:

- Customer self-service – data queries (permits, source locations, etc.), register complaints, permit and incentive program applications, public records requests
- Improve appearance and ease of navigation
- Responsive design – adapts to different devices
- Enhance content management capabilities
Data Integration Project

Focus:

- Increase efficiency by eliminating duplication of effort and automating review/approval process
- Increase system performance, reliability & integrity of data
- Integrate with website to allow for enhanced customer self-service
- Provide mobile options for field staff
- Connect to financial system
- Reduced maintenance / troubleshooting / file storage
Red X represents manual steps eliminated or streamlined through automation.
Focus:

- Automated grant and fund management
- Track expenses by program
- Pre-encumbrance and encumbrance recording
- Improve reporting capabilities for enhanced budgeting and financial planning
- Improve internal controls
- Automate review/approval for efficiency and accuracy
Collaboration, Workflow, Document Management Project

Focus:

- Create sites for information sharing and enhanced ability for staff to collaborate on work products
- Automate several manual processes
  - Permit Applications and Renewals
  - Purchase Requests and Contracting
  - Travel Requests and Board Packages
  - Rule Development and Mobile Source Incentive Program Administration
- Create central repository for District documents to facilitate collaboration, easy retrieval, version control and compliance with records retention schedules
Focus:

- Conversations in one app—IM, audio and video calls, online meetings and sharing
- Collaborate from Office applications like Word and PowerPoint to start meetings and/or present whatever staff is working on
- Schedule meetings and see IM history in Outlook
## Benefits

<table>
<thead>
<tr>
<th>Customer</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Enhanced self-service; reduced drive-time</td>
<td>• Eliminate duplication of effort and reduce likelihood of errors</td>
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<tr>
<td>• Real-time data</td>
<td>• More data driven decision-making</td>
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<tr>
<td>• More intuitive and improved navigation</td>
<td>• Better collaboration on work tasks and projects</td>
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<tr>
<td>• Increased transparency</td>
<td>• Improved employee morale/retention</td>
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<td></td>
<td>• Increased flexibility to work using mobile devices</td>
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<td></td>
<td>• Improved training / knowledge transfer capabilities</td>
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</table>
## Benefits (continued)

| Financial | • One-time expenditures, on-going gains in efficiency and accuracy  
|           | • Increase capacity for growth without adding resources  
|           | • Improved operating and capital budget planning & reporting  
|           | • Reduced supply costs, e.g. paper, toner, file cabinets, etc.  |

| Technical | • Control of managing the process  
|           | • Reduced data storage  
|           | • Web accessible / centralized control / remote update capabilities  
|           | • Interconnectivity to all enterprise systems  
|           | • More secure, easier to maintain  |

| Risk Reduction | • Improved document versioning and records management  
|               | • Reduced reliance on individual knowledge  |
## Systems Integration Project Timeline

<table>
<thead>
<tr>
<th>Task Name</th>
<th>2016</th>
<th>2017</th>
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<tbody>
<tr>
<td>Communication Systems</td>
<td></td>
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<tr>
<td>Website (Internet)</td>
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<tr>
<td>Collaboration/Workflow (Intranet)</td>
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<tr>
<td>Document Management</td>
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<tr>
<td>Line of Business Interface/Database</td>
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<tr>
<td>Finance</td>
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</table>
Next Steps

October 2015 – Release RFP for Line of Business Database (LOB) and Finance Enterprise Systems

October 2015 – Contract Authorization to Board of Directors
- SharePoint Implementation (Website/Intranet/Workflow/Doc Mgmt)
- Skype for Business Implementation (Unified Communication)

November 2015 – Begin SharePoint and Skype for Business Projects

January 2016 – Contract Authorization to Board of Directors
- LOB and Finance System Implementation

February 2016 – Begin LOB and Finance Projects
RFP Response and 20-page limit: Update RFP to reflect sections 9-18 count as part of 20-page limit. Bios/resumes for section 15 may also be attached and excluded from the 20-page limit.

District desires the public websites (SMAQMD and CAPCOA) to be completed by August 1, 2016.

It is anticipated that 8-10 business/functional users will update content/images on the public sites. IT staff will update content beyond their scope.

Interactive forms and workflow on the www.airquality.org site (to be determined, examples)
Submitted Questions (continued)

CAPCOA websites:

- Public and private – requesting access for proposers to view private site
- Hosted on Media Temple services – separate organization, stand-alone website maintained by CAPCOA staff

Reference to installation of Metalogix, Nintex, K2 and AgilePoint – District does not own any of these applications. Seeking recommendation from proposers on apps to support form development and workflow functionality

EMC AppExtender as part of this overall effort – desire is to migrate all document management to SP if feasible
Open Discussion
SCOPE OF SERVICES

SharePoint Implementation

The SharePoint Project Phases outlined in this attachment are to be executed, as applicable, to ensure the successful deployment of each of the Tasks listed below. The Consultant will recommend whether to implement SharePoint 2013 or SharePoint 2016 to most effectively achieve the Tasks below, and provide explanations to support their recommendations.

Task 1: Design, develop and implement a District Internet Site

Task 2: Design, develop and implement a CAPCOA Internet Site

Note: Additional details for Tasks #1 and #2 are included as Exhibit A to Attachment #1.

Task 3: Design, develop and implement a District Intranet Site

The SharePoint Intranet will serve as a centralized location for inter-district information sharing that: fosters user interaction through various technological features that utilize effective communication tools; reduces the redundancy of business/project documents, frequent email transfers, misallocation of network storage space as well as time spent in searching and identifying job related materials.

Task 4: Design, develop and implement a District extranet site

A secure portal that allows controlled access to District partners, vendors and suppliers or an authorized set of customers to certain District information.

Task 5: Collaboration Site Development

Develop and deploy six (6) collaboration sites; site content and structure to be determined as an outcome of requirement gathering.

Task 6: Document Storage, Search and Management

Develop a centralized content repository capable of supporting various documents and media types (including videos) that is accessible by all authenticated users via the built-in search engine as well as other communications tools. In addition:

- Implement document sharing, editing, versioning, security, data retention, and legal hold associated with the existing file repository and EMC’s AppXtender.
- Migrate and/or link data that currently resides in shared file repository into SharePoint System.
- Define the core architecture of the Search service and its supported topologies and configure the key components of search.
- Leverage e-discovery to search outside of archive and support legal holds.

**Task 7: Workflow Automation and Forms**

Develop five (5) automated workflows for essential business processes identified by the District. Example processes include purchase requisition, Board of Director reports and agendas, travel requests, and contract administration, etc. Electronic routing and digital signatures must be included as part of the workflow.

**Task 8: Business Intelligence**

Utilizing PerformancePoint, Excel, and Visio Services as well as Chart Web Parts and SharePoint status indicators, create a minimum of ten (10) reports, scorecards, and/or dashboards that enable the District to make better, more informed business decisions. Configure at least one (1) real-time dashboard that updates for projects, issues, and financial status.

**Task 9: Project Management**

Develop and deploy a project management solution to help teams manage and collaborate on projects and track and manage projects and tasks across District programs.

**Task 10: SharePoint Post Implementation Services**

Refine policy, process, and procedure around post deployment SharePoint governance, administration, support, and development. Provide post-implementation technical support along with documentation, training materials and updates where improvements or changes in process are identified. Provide knowledge transfer and best practice exposure throughout the engagement to assist in positioning a successful design, migration and maintenance plan to include architecture patching procedures and processes.

**SharePoint Implementation – Project Phases**

The SharePoint implementation should incorporate the project phases as outlined below (including but not limited to planning, analysis and evaluation, information architecture, design, site implementation and integration, quality assurance and usability testing, and launch) as applicable for each Task noted in Attachment #1. It is understood and expected that the project as a whole will involve iteration and parallel development within and among each Task as further detailed in Contractor's proposal and incorporated into the Contract Statement of Work.

To the extent the project phases/elements listed below are not necessary to execute Tasks 1-10 above, the contractor will identify how those remaining elements will be implemented or state why they are deemed unnecessary.
Architectural Design Review

- Evaluate architectural design of District system;
- Conduct taxonomy and governance study across all divisions and gather information about the divisions as well as the interactions between divisions, outside agencies and general public;
- Evaluate platform options, design a scalable architecture and deliver a best-practice system design;
- Document specifications and requirements to scale out server, storage, and network infrastructure if needed and develop and verify high availability, backup and disaster recovery plans and procedures for SharePoint;
- Document current and future business processes and workflows resulting from the software implementation;
- Ensure that select District staff are engaged during all activities of design and development to facilitate knowledge transfer; and
- Provide all information to District staff for review to ensure that the proposed work is consistent with the goals of the project.

Planning Services

- Develop strategies;
- Assess available opportunities;
- Explore relationships to other technologies such as EMC AppXtender;
- Create and execute a detailed governance plan; and
- Provide a detailed work plan with specific milestones and schedule dates, estimate resource expenditures required for the duration of the project, and address every identified task.

Requirements Gathering

- Gather requirements to support the planning and design activities that are part of this effort. The outcome of this effort will be documented and delivered to District; and
- Specify any other requirements that the Contractor finds necessary in order to deliver a viable SharePoint solution to District.

Installation

Contractor shall provide a fully functional SharePoint environment on District premises.

- Install SharePoint Enterprise farm in development, test, and production environments.
- Install and configure any updates and third party applications including but not limited to Metalogix Content Matrix, Ninetex, K2, AgilePoint; and
- Develop a user interface for MS SharePoint that meets the District specifications and configure service applications like Search, Metadata, User Profile synchronization etc.

**System Administration**

- Assign proper permissions for all users of the site as well as anonymous access. Configure Business Connectivity Services for external database(s);
- Provide controlled access to change privileges;
- Provide ability to set up roles and manage access by resource/person;
- Configure SharePoint to work with a variety of authentication providers, and configure authenticated connections between SharePoint and other server platforms;
- Secure the SharePoint platform and configure farm-level security
- Implement high availability and backup; and
- Ensure ownership of the SharePoint design and all content and code will be transferred to District, in a timely manner, upon completion of the project.

**Usability Testing**

Contractor will facilitate and execute user testing of information architecture and implemented designs in part and in whole, analyze the results of the testing, and make recommendations as needed. Contractor should:

- Create a usability test plan that includes measurable usability objectives set in conjunction with the District staff, a usability test strategy and methodology, and clear definition of all tests, tasks, scenarios, and success criteria;
- Administer the usability test with selected District staff (e.g., prepare test documents, set-up testing environment, facilitate, and execute usability test) in accordance with the test plan; and
- Report findings ranked by severity/criticality/degree(s) of importance including comparative data from the baseline usability testing of original site, prototype testing, and new website testing and Contractor's recommendations.

**Quality Assurance**

Contractor will conduct pre-launch SharePoint testing based on industry best practices, and subject to District’s final review and approval:

- Develop and implement a comprehensive quality assurance test plan based on identified requirements and specifications to ensure that the system is completely operational, void of defects, and with all conflicts resolved by the launch date;
- Develop manual and automated test cases/scenarios;
- Perform and execute the manual and automated QA test cases/scenarios;
- Document testing results, resolve all identified errors, conflicts, and bugs, and track/report the bug/defect resolution; and
- Develop a maintenance plan that details expected maintenance tasks as well as detailed, written instructions for District staff to access, add content to, correct, repair, and/or otherwise modify the system during the warranty period.

**Project Management**

- Establish and manage a formalized project approach;
- Manage resources for development of system;
- Manage timeline for development and testing;
- Develop a deployment plan that includes (i) a proposed work schedule to accomplish all of the required tasks within the desired timeline and (ii) project objectives and success criteria, deliverables, role/responsibilities/contact information, communication protocols;
- Incorporate the implementation and activation of each site within this request upon completion into the project schedule so that users can begin taking advantage of SharePoint features and services as soon as possible;
- Document control methodology and cost management;
- Discuss the methodologies you believe are essential to accomplishing this project;
- Describe the process for collaborating with the District on the project plan and the mechanism used to allow our organization to make final changes to that plan; and
- Develop a quality management plan.

**Training and Knowledge Transfer**

- Provide training to system administrators and end users for the ongoing maintenance of SharePoint System. The training of technical support staff and site owners must be sufficient to ensure they will be able to handle their duties competently;
- Provide knowledge transfer of SharePoint environment setup activities, documentation procedures, reporting templates and project-specific information. Knowledge will be transferred to the existing staff and incoming staff;
- Develop procedures for analysis and coordination activities that will be housed in a centralized repository; and
- Compile a list of resources, educational materials, and training opportunities as needed for complete knowledge transfer.

**Monitoring and Maintaining a SharePoint Environment**

Develop a high-level monitoring plan for a SharePoint environment for District staff to implement including how to:
- Tune and optimize a SharePoint server farm on an ongoing basis;
- Configure caching to improve the performance of a SharePoint deployment; and
- Troubleshoot errors and other issues in a SharePoint deployment.
Exhibit A to Attachment #1

Sacramento Metropolitan Air Quality Management District

Website Design Guidelines

The District’s website project includes analysis and evaluation of current and future web needs, assessment of the information architecture with recommendations for improvement and development of the new web design, migration of existing content, testing and implementation.

While the District has identified specific requirements and desired enhancements, the District encourages respondents to submit recommendations for features and enhancements to the web design.

Analysis and Evaluation

Contractor will:

- Work with the District’s Information Management (IM) and the Web Design Committee (Committee) to understand the objectives for the design initiative;
- Work with the Committee during initial planning to define the scope, requirements, and resources for all the project tasks and to develop a strategy or approach to information design and the end user experience. The Committee will help the Contractor to understand the range of users of District’s website in order to better understand the target audience and their constraints;
- Analyze and assess the purpose of the Website in achieving District’s goals. Review and document existing website content, architecture, and structure and will develop content inventories; and

Review and evaluate the results of existing web metrics from reports generated by District web analytics tools, surveys, customer service calls/emails, and usability results to better understand how site visitors are accessing and interacting with the website. Deliverables for this project will be based on industry research, expert analysis, consultation with IM staff, and conversation with Committee members and, for this phase, include:

- A project plan (hard copy and electronic) which identifies resources for the remaining project activities and finalizes the project schedule/GANTT chart that will be used to manage and execute the entire project;
- A user experience strategy document detailing the objectives of the information architecture and usability services and the guiding principles/rationale underlying them;
- A comprehensive written analysis of District’s existing online user feedback data (web server logs and analysis, emails, and other customer service information as available);
- A document that summarizes representative user characteristics of all District’s on-line audiences and constituencies (e.g., typical needs, behaviors, and information seeking traits and requirements).

**Information Architecture Organization and Development**

Contractor will develop the information architecture that will serve as the underlying structure for District’s new web design. In this context, based on industry best practices and the information and analysis completed in Task 1, Contractor will:

- Develop website terminology, nomenclature, and labeling to ensure use of logical and intuitive terminology based on users’ knowledge levels;
- Organize site content;
- Develop high-level categorization that is flexible, scalable, and modular;
- Develop wireframes and interface specifications for all content areas and properties to be included in the Website design;
- Consult on user interface design options to ensure layout, design, and organization is useful, usable, accessible, and otherwise consistent with the information architecture strategy and objectives established for the website;
- Develop a content migration strategy plan;
- Create high-level and detailed site maps and site navigation strategy; and
- Recommend improving the current image library which stores image files confirmed for use on our website (that is, the District holds the rights or has obtained the rights).

**Design**

Contractor will design the user interface and graphic design (look and feel) of the website based on industry best practices. Contractor will develop a comprehensive visual design for the website to be inclusive of all content areas and types.

- Incorporate of District’s visual identity and brand into site design principles;
- Develop multiple design options, concepts, and prototypes through an iterative process;
- Develop visual design templates for all major content areas, page types and interaction contexts;
- Develop a comprehensive style guide that includes Website graphic design, content style, and usage; and
- Develop broken link automatic report/repair system
Website Requirements

Contractor will include all requirements typical of a best-practices, contemporary website. The District has highlighted the following requirement to be included in the website:

- Incorporates navigational tools such as graphic navigation buttons or bars offering shortcuts, tabbed or drop-down menus grouping related information, and breadcrumbs. Navigational tools should be included on every page. The design should include a link to the District home page link in the same position on each page;
- Accommodates reasonable flexibility in the navigation scheme so that the design does not need to be revamped when changes are made;
- Complies with Section 508 of the Rehabilitation Act of 1973 as well as Americans with Disabilities (ADA) Best Practices for Website Accessibility for state and local governments and the Web Content Accessibility Guidelines developed by the Web Accessibility Initiative, a subgroup of the World Wide Web Consortium (W3C);
- Build upon proven and accepted web development standards while maintaining the flexibility to easily grow and add new functionality for target audiences and administrators over time and with minimal cost; and
- Ownership of the website design and all content and code must be transferred to the District upon completion of the project.
- Runs efficiently on standard web browsers, including:
  - Internet Explorer 9 and above and Microsoft Edge
  - Safari 5 and above
  - Firefox 2 and above
  - Google Chrome
  - Opera 10 and above
  - Incompatible or legacy browsers (e.g., Internet Explorer 8 and below) should display a message asking visitors to upgrade their browser with links to a suggested alternative;
- Responsive in design to support mobile devices, tablets, etc.;
- Includes a comprehensive search function for all content on the site. District currently uses Google Site Search but is open to other search applications;
- Include a number of static forms for the public and the regulated community to use and contains links or embedded plug-ins such as Java and Adobe for opening and viewing these documents and allow the user to download the latest version of certain applications, for example Adobe Reader;
- Develop an event calendar that allows multiple categories and items, with the following features:
  - Single or recurring events
  - Space for full descriptions including the ability to post images, tables and video within the description
  - Ability to view calendars by a list of events, a week view or a month view
  - Ability to filter by category, a start date and an end date, and search for keywords
  - Post events automatically
Importable into major calendar applications;

- Offer a variety of communication methods to keep audiences up-to-date, including e-mail notifications, SMS text messages, live streaming, and other forms of electronic communication;
- Incorporate content and interactive enhancements, such as: video-on-demand, interactive meetings, conference registration and payment, web-based complaint form, web-based comment form, launch portal to an interactive map of regulated facilities (developed separately potentially using Sacramento County’s GIS platform, enhancement of wildfire page(s));
- Leverage social media within the site platform from the Home Page to reach interested stakeholders (communities);
- Support sharing of content with social media: Facebook, Twitter, YouTube, etc.;
- Allow administrators to create and assign users to roles, enabling differing levels of content control and authorship, including content approval for publishing;
- Automatically create and update a sitemap and on-page breadcrumbs when content is added, edited or removed from the site;

- Allows administrators to set dates and times for automated content publication, and content to expire on a particular date and time;
- Support photo galleries, including the ability to “page” through a gallery in an intuitive manner;
- Allow creation of functional groupings of web pages or portions of web pages;
- Enable or disable comments on content;
- Access to support materials including online training manuals, support FAQs, and other forms of customer support.
- Authenticate users (authors, editors and reviewers) and assign permissions.
- Provide capabilities for multisite and multilingual management;
- Provide web analytics and reporting capabilities;
- Support entry and display of UNICODE-enabled fonts; and
- Include APIs and/or SDK for integration with and/or development of third-party or custom web apps.

Website Implementation

Following the information architecture and design phases of the project, Contractor will complete and implement a fully viable and functional website on a turn-key basis for public launch. Contractor will migrate specific content from existing website to the new website.

Training

Contractor will conduct on-site website training for District staff including 3-5 administrators, up to 10 power users, and up to 20 end (content development) users.
California Air Pollution Controller Officers Association (CAPCOA)

Website Design Guidelines

CAPCOA will have many of the same requirements as the District, however the CAPCOA website is much smaller in scale and scope. Contractor will consult with CAPCOA and District staff in establishing specific requirements or identifying where requirements may differ (most likely be less than) those required by the District.

The design of the website should be consistent with existing CAPCOA logo, welcoming, attractive and easy to navigate. The goal is, in part, to offer the public and CAPCOA members an attractive, user-friendly website that provides improved document management. The site should also allow members of the public with limited computer experience to easily find and access information and online services and should have a clearer, more logical and user-friendly navigational approach. The final version of the design should be a collaborative effort between the District, CAPCOA staff and the selected contractor. The features listed below reflect requirements for the website design (look and feel, theme, HTML, CSS, etc.).

The website will be hosted externally on Media Temple servers. The website will be designed to provide necessary security measures to protect the data.

The CAPCOA website redesign project will follow a phased project approach that incorporates planning, analysis and evaluation, information architecture, design, site implementation and integration, quality assurance and usability testing, and launch. It is understood and expected that the project as a whole will involve iteration and parallel development within and among each phase as further detailed in Contractor's proposal and incorporated into the Contract Statement of Work.