



LINNÉ K. STOUT  
DIRECTOR

State of California-Health and Human Services Agency  
**DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT**  
2389 Gateway Oaks Drive, Suite 100, Sacramento, CA 95833  
Telephone: (916) 576-7109 | Fax: (916) 263-1406  
[www.csd.ca.gov](http://www.csd.ca.gov)



EDMUND G. BROWN JR.  
GOVERNOR

## REQUEST FOR OFFER

No. 2014-RFO-33

### Business Process Analysis

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**For: Business Process Improvements and Efficiencies**

**Date: April 8, 2014**

You are invited to review and respond to this Request for Offer (RFO) for the Business Process Analysis for the Department of Community Services and Development (CSD). The goals of the project are to identify process refinements and/or technology solutions that will optimize operating efficiency and cost benefit of core business functions within the Community Services and Development.

To submit an offer you must comply with the instructions contained in this RFO, as well as the requirements stated in the Statement of Work and Cost sheet (Attachment B). By submitting an offer, your firm/organization agrees to the terms and conditions stated in this RFO and your proposed California Multiple Awards Schedule (CMAS) contract.

Read this document carefully and thoroughly. **Your response to this RFO is due by close of business April 25, 2014 at 5:00 PM.** Responses received after the deadline submission will not be accepted. Responses to this RFO must be submitted in electronic form (Microsoft Word 2003, 2007 or 2010; or a PDF document) or mailed with the required copies to the respective address listed below. Any questions should be directed to the Department Contact listed below.

**Department Contact:**

Sean Hammer-Hernandez  
Department of Community Services and Development  
2389 Gateway Oaks Drive  
Sacramento, CA 95833

[Sean.Hammer-Hernandez@CSD.CA.GOV](mailto:Sean.Hammer-Hernandez@CSD.CA.GOV)

(916) 576-5312

### 1. Purpose

The Department of Community Services and Development (CSD) is seeking a qualified Business Analyst Consultant/Firm to perform a multi-phase business process analysis to document existing core business processes (functions) and identify where process refinements and/or technology solutions can effectuate greater efficiency and improvement to core business functions.

### 2. Projected Key Dates

| Action                                      | Date                               |
|---|------------------------------------|
| Release of RFO                              | April 8, 2014                      |
| Written Question Submittal Deadline         | April 14, 2014                     |
| Answer(s) to Questions Received Distributed | April 16, 2014                     |
| RFO Response Submission Due Date            | <b>April 25, 2014 by 5:00 p.m.</b> |
| CSD Response Evaluation/Selection           | April 28-May 13, 2014              |
| Anticipated Contract Award Date             | May 15, 2014                       |
| Contract Term                               | June 1, 2014 – September 30, 2014  |

### 3. Scope of Work (SOW)

CSD anticipates this project to be achieved in six phases and/or deliverables. The phases and/or deliverables are: 1) document current (as is) business processes used by the Community Services Division; 2) facilitate a cross representative team review of document processes to define the purpose, structure and operation of business processes and identify areas where inefficiency and redundancy exists; 3) evaluate current technologies that are available to the Community Services Division; 4) identify the process “gaps” and analyze where process improvements and/or the introduced use of technology can successfully remediate identified “gaps” and; 5) provide a mapping of the “ideal” business process incorporating suggested process refinements and uses of technology and 6) prepare a document summarizing all recommendations to improve all business processes. This document shall list all opportunities to improve business processes in priority order using a methodology factoring importance (of process or work product), estimated cost investment and potential returns in both monetary and non-monetary terms. If a significant amount of the efficiency is dependent on the use of new software or application system then include a technology vision or road map to guide the Department’s pursuit of recommended new technology solutions. For more background (see Attachment A).

The CSD Contract Managers for this Agreement will be:

| <b>Primary</b>                       | <b>Secondary</b>                     |
|--------------------------------------|--------------------------------------|
| Section: Community Services Division | Section: Community Services Division |
| Attention: Leslie Taylor             | Attention: Pamela Harrison           |
| Address: 2389 Gateway Oaks Drive     | Address: 2389 Gateway Oaks Drive     |
| City/State/Zip: Sacramento, CA 95833 | City/State/Zip: Sacramento, CA 95833 |
| Telephone: (916) 576-7192            | Telephone: (916) 576-7188            |
| E-mail: Leslie.Taylor@csd.ca.gov     | E-mail: Pamela.Harrison@csd.ca.gov   |

CSD may change the Contract Manager upon providing ten (10) days written notice to the other party.

#### **4. Period(s) of Performance**

- 4.1 The term of this agreement is: **June 1, 2014** through **September 30, 2014**.
- 4.2 If the identified services included in the executed Agreement are not completed within the term and unspent funds remain in the Agreement, CSD may exercise an option to extend the term of the Agreement for up to two months after the initial California Multiple Award Schedule, at no additional cost. This will allow the Contractor the ability to complete the identified tasks at the originally agreed-upon hourly rates ensuring that the total Agreement costs are not exceeded.
- 4.3 The Contractor shall not be authorized to deliver or commence performance of services as described in the solicitation until the contract agreement – scope of work- has been executed. Any delivery or performance of service commenced prior to the Contractor obtaining all written approvals shall be considered voluntary on the part of the Contractor.
- 4.4 The expected period of performance associated with the contract opportunity starts from the contract award date through September 30, 2014.

#### **5. Project Cost**

- 5.1 The total cost of this Agreement shall be reasonable and reflect a prudent use of government funds. The cost shall not exceed \$400,000. Cost includes any required travel.

#### **6. RFO Response Requirements**

This RFO and the Contractor's response will be made a part of the CSD's Purchase Order and procurement contract file.

Responses must contain all information requested and conform to the format described in this section. It is the Contractor's responsibility to provide all required information for CSD to evaluate the response, verify the requested information and determine the contract employee(s) ability to perform the tasks and activities defined in the *Purpose and Contractor Responsibilities* sections. The Contractor must submit **two** copies of the RFO response.

Upon completion, developing, and/or signing (as applicable) the items identified below, assemble responses in the order specified below:

1. Cover Letter
2. Firm/Organization Qualifications and References
3. Proposal
4. Contractor Staff Employees Resumes
5. Contractor Staff Employees References
6. Date Availability
7. Cost Sheet
8. Small Business or Disabled Veteran Certification
9. Current CMAS Agreement and its CMAS pricing pages(s)

The Contractor must submit a copy of its offer in electronic form (Microsoft Word 2003, 2007 or 2010; or a PDF document) or mail two (2) copies of the required documents to the Department Contact using the following address:

**DEPARTMENT CONTACT:**

Sean Hammer-Hernandez, Administrative Operations Manager  
Department of Community Services and Development  
2389 Gateway Oaks Drive, #100  
Sacramento, CA 95833-4246  
[Sean.Hammer-Hernandez@CSD.CA.GOV@CSD.CA.GOV](mailto:Sean.Hammer-Hernandez@CSD.CA.GOV@CSD.CA.GOV)  
Telephone #: 916-576-5312

**7. RFO Response Content**

The Contractor's Response must include the following:

**7.1 Cover Letter**

The cover letter with a duly authorized signature with contact information for the key staff person.

**7.2 Firm/Organization Qualifications and References**

The Contractor must provide an organizational chart that highlights those staff who will be assigned as CSD's contacts. Provide two (2) references that have been served by your firm within the past five (5) years. The Contractor must provide the firms/organizations that can verify its organizational performance, i.e., quality of work, experience and performance of employees, customer support, reliability, availability of employees, flexibility in resolving customer problems, etc. Contractor shall complete the form provided in Attachment D for each reference. Please be sure that the telephone, fax numbers, and email addresses are current as references will be contacted.

### 7.3 Proposal

The Contractor must describe the overall approach and/or methods that will be used to accomplish the scope of work. Include the specific tasks/activities and functions to be performed in the order they are to occur and indicate who will have primary responsibility for performing tasks/activities or functions.

### 7.4 Contractor Staff Employee Resumes

The Contractor must provide a resume for each contract employee the Contractor proposes to assign to CSD for the term of the contract. The resumes must include all relevant work experience and in sufficient detail to verify the contract staff experience. The experience should be presented by each engagement the staff has had in the prior five years, per minimum qualifications required. A primary and a backup resource resume should be included. Describe how the employee meets the minimum qualifications. Use the table in the *Contractor Team Qualifications* section.

### 7.5 Contractor Staff Employee References

The Contractor must provide references for each staff person identifying his/her experience that meet the requirements delineated in the *Contractor Team Qualifications* section. The contract employee shall complete the form provided in Attachment B for each reference. When possible, the references shall be for similar work (see *Purpose and Contractor Responsibilities* sections) that is currently in progress or completed. The Contractor must ensure that the contract employee provides current and accurate telephone and email addresses as references will be contacted. **Interviews of selected Contractor staff may be conducted for selected Contractor.**

### 7.6 Date of Availability

The Contractor shall specify the date(s) each staff will be available to commence work. The staff must be available within 30 days of the award of the contract (see *Key Dates* section) to be considered responsive (see *Evaluation Process* section). Selected Contractor staff must remain available for the entire length of the contract. A back up can be used in place for circumstances as an exception to the rule. In the event a change in Contractor staff is needed, a new Contractor staff person will be subject to CSD's interview process.

#### 7.7 Cost Sheet (Price)

The Contractor shall provide an hourly rate for each of the staff who the Contractor proposes to assign to CSD to deliver all services/deliverable as outlined in the RFO using the Cost Sheet (see Attachment B).

#### 7.8 Small Business or Disabled Veteran Certification

A copy of Small Business or Disabled Veteran Certification (if applicable)

#### 7.9 CMAS Agreement

A complete copy of the Applicants current CMAS Agreement and its CMAS pricing pages(s) pertaining to the work to be performed.

### **8. Contractor Team Qualifications**

#### Mandatory Qualifications

At minimum, each team member must have experience in at least one area listed below. The experience in all of the areas listed below must be addressed collectively as a team. Failure to meet these mandatory qualifications will result in the disqualification of the proposal.

Listing the most recent experience first, complete the following table describing the Contractor's Team experience. Multiple companies can be listed to support the Contractor's Team experience. It is the Contractor's responsibility to clearly describe how the experience meets the required timeframes. All work to meet these requirements must be paid work performed within the past five (5) years.

|    | <b>Experience</b>   | <b>Company</b> | <b>Dates and Timeframes</b> |
|----|---|----------------|-----------------------------|
| 1. | a. Must have a minimum of five (5) years paid experience working with governmental entities, public, non-profit, and community based organizations.   |                |                             |
| 2. | At least five (5) years of paid experience in:<br><br>a. Conducting analysis of business processes.<br>b. Developing process and data flow diagrams.<br>c. Developing reports and identifying gaps.<br>d. Developing and presenting recommendations to address identified gaps.<br>e. Preparing implementation plans. |                |                             |
| 3. | a. Ability to present information, in a clear and concise format, both verbally and in writing.   |                |                             |
| 4. | a. Knowledge of current information technology solutions and costs.   |                |                             |
| 5. | a. Demonstrated ability to conduct meetings with all stakeholders; including various levels of staff (i.e., executive, mid-management, Information Technology professionals, and rank and file).  |                |                             |

## **9. Responsibilities and Tasks**

### **9.1 CSD Responsibilities:**

- a. Provide office space for the duration of the contract, including: desk, chair, telephone, printer access, and a personal computer with connectivity to the CSD network.
- b. Provide appropriate access to necessary areas of the CSD project office during CSD business working hours (8 a.m. to 6 p.m.).
- c. Provide a security badge for access to the CSD project office.
- d. Make Subject Matter Experts (SMEs) available to provide the Contractor with process related information. The Contractor will be responsible for documenting the process related information as SMEs will serve in an advisory capacity only.
- e. Timely review and approval of the Contractor information and documentation provided by the Contractor to perform its obligation under this SOW.

- f. Timely review and written approval of project deliverables.
- g. CSD shall designate a Contract Manager who shall be the contact person to whom all Contractor communications may be addressed and who has the authority to act on all aspects of the services. The Contract Manager will review the agreement and associated documents with the Contractor to ensure understanding of the responsibilities of both parties.
- h. CSD will provide sufficient access to appropriate levels of staff, business representatives, other users, and department management, as appropriate to facilitate the performance of consulting tasks and creation of consulting deliverables.
- i. CSD will provide timely review and approval of the deliverables provided by the Contractor in order for the Contractor to perform its obligations under the agreement.
- j. CSD will make payments based on the completion and acceptance of specific deliverables as identified in the Cost Data Sheets (see Attachment B).

## 9.2 Contractor Responsibilities:

CSD expects the chosen Contractor to quantify any recommended improvements and/or efficiency in terms of possible cost avoidance or cost savings. The quantification doesn't have to be a detailed cost/benefit analysis for each recommendation; however, CSD does expect an estimated dollar savings that may be achieved or with the implementation of the each recommendation. Second, the priority associated to each core process improvement shall be:

- a. Develop and maintain an up-to-date, detailed project work plan in Microsoft Project. Update the project plan at least weekly and submit to the CSD Project Manager.
- b. Submit written status reports weekly to the CSD Project manager. The weekly status report should include the following:
  - 1. The prior week's activities;
  - 2. The success, continuation, failure or resolution of each prior week's activity;
  - 3. The activities planned for the current week;
  - 4. Any issues or risks; and,
  - 5. The report shall be a Microsoft Word document that is reviewed verbally at each weekly project status meeting.

- c. Submit meeting agendas, reports, and updated project plans 24 hours in advance of all meetings.
- d. Attend scheduled (time frame to be determined) project meetings with the CSD Project Manager and/or project team, and other key stakeholders.
- e. During the entire contract duration, be available to provide assistance to the CSD Project Manager addressing questions from the CSD Project team, CSD Steering Committee, CSD Program and Information Technology staff and CSBG eligible entities.
- f. Contractor shall comply with all applicable CSD and state policies and procedures including, but not limited to, policies regarding Sexual Harassment Prevention, Data Security Standards for Personally Identifiable Information (PII), IT Security, Workplace Violence Prevention, and Emergency Preparedness.
- g. Contractor shall designate a person to whom all project communications shall be addressed and who has the authority to act on all aspects of the contract services. This person shall be responsible for the overall project and shall be the contact for all invoice issues and Contractor staffing issues.
- h. Submit all written deliverables to CSD in final form. They must be free of grammatical and spelling errors, and formatting must be correct.
- i. Conduct business activities in a professional manner that leads to superior customer satisfaction.
- j. Contractor personnel will not work more than eight (8) hours per day or more than forty (40) hours per week. Work will be conducted at the CSD project site during normal CSD business hours (8:00 am to 6:00 pm, Monday – Friday, State holidays excluded) in order to interact with and interview CSD Program and IT staff and CSBG eligible entities.

## **10. Deliverables**

Contractor must provide a detailed analysis and plan that includes results from the assessment and study of the data collection, data management, and data reporting processes in the Community Services Division.

### **A. Review Business Processes**

Contractor shall conduct a review of the current operational and business processes and procedures compared with business requirements and provide a written analysis with recommendations.

At minimum, but not limited to, the Contractor shall review and report on the processes identified in Attachment A. In addition, the review will include a review and report on the following:

- Operational processes and procedures (automated and manual) and data flow diagrams
- Quality management activities
- Ad-hoc data reporting
- Data accuracy and integrity

#### **B. Review Business Functions**

Contractor shall conduct an assessment of the business functions and evaluate the quality of work products and effectiveness of processes to identify the competence within the Community Services Division. The Contractor shall provide a report that includes its findings and recommendations.

#### **C. Review Standard Operation Procedures, Policies and Adherence to Policies and Procedures**

Contractor shall provide a written assessment along with recommendations on process efficiencies and a cost benefits/analysis. For example, Contractor shall provide insight into areas such as:

- Are issues and risks being defined, tracked, escalated and resolved appropriate and timely?
- Are decisions escalated and acted upon timely and appropriately?
- Are problem identification, tracking, and resolution performed timely?

#### **D. Perform "As-is" Review**

Contractor shall conduct an assessment of the current system in its "As-is" form and provide written comments with options including:

- Develop a list of documents required for "As-Is" analysis and stakeholders to interview;
- Review and analyze documentation and interview stakeholders; and,

- Develop a detailed report of the current business policies, practices, and functions, including processes, work flows, roles and responsibilities, and level of training required to accomplish business functions.

#### **E. Develop a set of “To be” Options**

Contractor shall develop a “To-be” model:

- Prepare a report that provides options for business process adjustments and improvement including policies and procedures, organizational structure, roles and responsibilities, work flow, and staff competences and applicable training;
- Identify applicable technology solutions; and,
- Identify options utilized by other states.

#### **F. Prepare a Gap Analysis Report**

- Identifies systemic and procedural gaps between “As-is” and best practices; and,
- How best to reduce or mitigate the “gaps”, in priority sequence.

#### **G. Conduct Best Practices Survey and a Report of other States Implementation**

The Contractor shall conduct a survey of states (number to be determined) to gather information and report on other state’s approaches used to meet the purpose of community action. The report shall include key factors that contributed to other states’ successful implementation, primary barriers and problems experienced by other states, and problem solution techniques that were used.

#### **H. Final Report**

Contractor shall provide a final written evaluation, executive level PowerPoint presentation, and verbal presentations. The final report and presentation must include a consolidated summary of Contractor’s major activities and deliverables, findings and recommendation of the deliverables, and provide alternatives with supporting analysis.

- Deliver a report that evaluates the technologies that the Community Services Division is using or may be able to leverage based on a current IT off-the-shelf or application system available.
- Deliver a plan that summarizes all alternatives and identifies the best solution to improve all business processes, reduce data collection

turnaround time, and/or leverage technology. The alternatives must include:

- Continue with the existing “As-is” practices with options for improvement or systemic redesign,
- Options for implementation of new systemic solutions.

Each alternative must be analyzed and include pro/con arguments, estimated costs and Return on Investment (ROI) analysis, and an evaluation of risk.

### **11. Reporting Requirements**

Contractor will be required to submit a weekly report that details the hours per day each of its staff worked. Hours should be listed in half hour increments. The report should contain the following:

1. Date of service or activity
2. The task, duration, and description of the task for which the hours are charged.

Weekly reports will be used to verify the Contractor’s billing statement that must be submitted at the last day of each calendar month. The reports will be submitted to the designated CSD staff.

### **12. Travel**

Contractor staff will not be reimbursed for travel to and from CSD’s headquarters. If travel outside CSD’s headquarters is required, the appropriate CSD manager must provide pre-approval of travel in writing before any travel begins.

### **13. Administration Requirements**

If the Contractor is selected to perform the work outlined in this RFO, Preference will be given to Small Business Enterprises and/or Disabled Veteran’s Business Enterprises. The Contractor must provide the following:

- a. Copies, when applicable, of documents to validate the Contractor’s Small Business Enterprise and/or Disabled Veterans Business Enterprise eligibility.
- b. A Certificate of Insurance for Professional Errors and Omissions Insurance.
- c. A Certificate of Insurance for General Liability Insurance in the amount of \$1M if the contract employee has an employer/employee relationship with the Contractor.

If the Contractor’s employee is a sub-contractor, the Contractor’s employee must provide a Certificate of Insurance for General Liability Insurance in the amount of \$1M.

**14. EVALUATION PROCESS**

CSD will use the “best value” method to determine the final selection of the Contractor and contract employees. At the time RFO responses are reviewed, each response will be checked for the presence or absence of the information required in the *RFO Response Content* section. If any required information is absent, CSD reserves the right to deem the offer as unresponsive and reject the offer.

CSD will evaluate each response to determine whether the Contractor’s response adequately addresses CSD’s minimum requirements.

CSD’s evaluation criteria and point system are as follows:

| <b>Criteria</b>  | <b>Information to be Considered</b>   | <b>Possible Points</b> |
|--|---|------------------------|
| <b>Firm/Organization Qualifications and References</b> | Contractor’s references regarding its organizational performance. References confirm that the firm/organization provides quality staffing, customer support, problem resolution.  | 15                     |
| <b>Proposal</b>  | Contractor must provide a detailed description of its approach to accomplish the scope of work and include the order the tasks/activities will be performed and the contractor staff who will have primary responsibility.  | 30                     |
| <b>Contractor Staff Employee Resumes</b>               | Contract employee(s) experience meets or exceeds CSD requirements. Interviews may be conducted.   | 20                     |
| <b>Contract Staff Employee References</b>              | Contract employee(s) references are for projects that are similar to CSD requirements. References provide comments which indicate that the employee can perform independently and effectively to provide a quality work product and efficiently completes assigned projects, and that the employee is dependable, flexible and able to manage multiple demands. | 10                     |
| <b>Cost Sheet (Price)</b>                              | Contractor must provide a completed cost sheet that details the hourly rate for each contractor staff assigned to deliver services/deliverables.  | 25                     |

A total of 100 points are possible for contract employees. Preference will be given to certified Small Business Enterprises and Disabled Veteran Business Enterprises, if the Contractor’s proposal is considered responsive.

**14. QUESTIONS**

If you require additional detail about this RFO, please email your questions to:  
[Sean.Hammer-Hernandez@csd.ca.gov](mailto:Sean.Hammer-Hernandez@csd.ca.gov).

## Attachment A

### Background

The Department of Community Services and Development (CSD) is designated by the Governor as the state agency responsible for administering the Community Services Block Grant (CSBG) in California. CSD partners with a network of sixty CSBG funded community based organizations (also referred to as CSBG Service Providers (CSP). CSBG is designed to provide a range of services to assist low-income families and individual in attaining the skills, knowledge, and motivation necessary to achieve self-sufficiency. CSBG supports a board range of locally determined services including employment services, education, income support/management, housing, emergency services, health and nutritional services. CSBG funding also enables local community organization to develop long range solutions to revitalize low-income communities, reduce poverty, and develop public/private partnership. Services with CSBG funds must contribute to the achievement of one or more of the six national goals.

The Community Services Division (CSDiv) is responsible for the administration and oversight of the CSBG program. The CSDiv is the primary liaison with the federal funding authority, the CSP, and is responsible for the administrative and programmatic evaluation, monitoring, and oversight of the CSP to ensure compliance with federal and state statutes, laws, policies and procedures.

Programs are administered in accordance with the CSBG statutory purposes and goals, and in compliance with applicable statutes, rules, regulations, policies and procedures set forth by federal and state government. The recipients of CSBG funds submit a biennial community action plan, an annual contract which includes a work plan that identifies the program services and activities and a budget detailing the use of the CSBG funds; also, the CSP is required to submit fiscal and programmatic reporting. In addition, the CSDiv coordinates with the CSP's on ad hoc request for information regarding the funded programs and services.

Listed below are the work products used to administer the CSBG program and the processes that will be evaluated for efficiencies:

#### **a. Monitoring Evaluation and Oversight**

##### **1. Pre-monitoring Assessment**

The CSBG Pre-Monitoring Assessment is an instrument utilized by the CSBG Field Operations Staff to prioritize the current years monitoring schedule and identify the type of monitoring that will be conducted.

##### **2. Desk Review Tool**

The CSBG Desk Review Tool is an instrument utilized by the CSBG Field Operations as an in-house process to evaluate documents maintained at CSD to identify facts that may warrant an on-site visit or desk review report.

3. On-site Monitoring Tool

The on-site monitoring tool is an instrument utilized by the CSBG Field Operation Staff while conducting an on-site visit. Staff conducts on-site visits to verify administrative, fiscal and programmatic data and to identify training and technical assistance needs. A monitoring report is developed that outlines the results of the on-site visit.

**b. Fiscal**

1. Budget Series

The CSP's submit a hard copy budget detailing how the CSBG funds will be expended during the contract term. CSP's submit a budget narrative that describes and supports the projected budget line items.

2. Monthly and Bimonthly Expenditure Activity Reports

The CSP's submit expenditure reports in accordance with the budgeted line items and based on actual expenditures via an Electronic Expenditure Activity Reporting System (EARS).

3. Annual Close-out Report

Within 90 calendar days after contract term date the CSP's submit a report to close-out the contract.

**c. Programmatic Reports**

1. Client Demographics

CSP's submit via email an excel form related to the demographic information of the individuals and families served; reports are submitted twice during the contract term (mid-year and annual).

2. National Performance Indicators – Work Plan

CSP's submit a hard copy of the Work Plan with the annual contract. The information is entered into an Excel workbook and printed to submit with the contract.

3. National Performance Indicators - Reporting

CSP's submit programmatic information on program services and activities via email using an Excel form; the report is submitted twice during the contract term (mid-year and annual).

**d. CSBG/Information Survey Report**

1. The annual CSBG/Information survey (Access database) is submitted electronically to the National Association for State Community Services Providers (NASCSPP). This report includes a narrative on the state and CSP accomplishments, the use of CSBG funds, client demographics, and program outcomes.
2. An annual factsheet is produced to demonstrate the state and CSP level data that is gathered from the annual CSBG/Information survey

**e. Community Action Plan (CAP)**

A CAP is required pursuant to Public Law 105-285, as amended 42 U.S.C. 9901, et seq. The State is required to secure a CAP from each eligible entity as a condition of funding. The information from the CAP is incorporated into the state plan and application. This document is submitted hardcopy on a biennial basis.

**f. State Plan and Application**

The state plan and application is a required report pursuant to federal statute (Public Law 105-285, as amended 42 U.S.C. 9901, et seq.) The State Plan and Application contains certifications and assurances regarding how the state will satisfy programmatic and public hearing requirements. Also, the plan describes how the CSBG program will operate in California. The state submits this plan on a biennial basis.

**g. Performance Management Measures**

A core set of nine (9) new performance based management standards that will be utilized by states and the federal government to measure the impact of the State's oversight efforts for the community services block grant funding. Final adoption and implementation is to begin to begin in 2015. CSD must begin developing the applicable infrastructure to collect, evaluate, monitor and report on the measures.

**h. Organizational Standards**

A set of new organizational standards will be utilized by states and local entities to assess key areas such as leadership, human resource management, financial operation, consumer input and involvement, community engagement, and board governance.

The final approval and implementation of the organizational standards is scheduled to begin in 2015. CSD must begin developing the applicable infrastructure to monitor, assess, evaluate, and report on the standards.

**i. CSD Program Notice (CPN)**

A CPN is a format utilized to disseminate guidance and/or policies to the CSP's.

**j. Public Website**

CSP's annually submit a hard copy of the Public Website form to update their program services and activities that are provided within their service areas.

**k. Ad-hoc reports**

The CSDiv develops reports in response to legislative and executive inquiries.

For purposes of this request, here is an example of an "As is" process. The CSP's submit to the CSDiv staff (per the contract requirements) for evaluation and approval a programmatic demographic report mid-year and annually). These reports are Excel documents submitted to a designated email box. The evaluation and approval process is currently a manual process which requires the CSDiv staff to print each report, conduct an analysis, email CSP's for additional information or clarification, print the revised information to conduct a further review, review, then submit to manager for approval. In addition, the approved annual data is manually keyed into the CSBG/IS report.

**Attachment B**  
**COST WORKSHEET**

| <b>Job Title or Classification</b> | <b>Hours</b> | <b>Rate</b> | <b>Extended Total</b> | <b>Task No. or Name</b> |
|------------------------------------|--------------|-------------|-----------------------|-------------------------|
|                                    |              |             |                       |                         |
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| <b>TOTAL</b>                       |              |             |                       |                         |

**Total Project Costs: \$** \_\_\_\_\_

Note: Please ensure that the project costs meet the requirement of the CMAS contract. Products, services and prices, should be at, or below, the CMAS contract rates. For personal services, you must include the labor categories and hourly rates as identified in the CMAS contract. Any sub-contracting activities are also subject to these requirements. It is not permissible to sub-contract for services not specifically identified in the CMAS contract.

If additional resources or tools are necessary to implement the strategy, such as software, applications or subscriptions, please include a listing of such in the proposal. Do not include these costs as part of the budget as noted above, unless these items are specifically priced in your CMAS or GSA contract.

**Attachment C**

**FIRM/ORGANIZATION REFERENCES**

|   |  |
|---|--|
| <b>Contract No.:</b>  | <b>Prime/Sub-Contractor Status:</b>  |
| <b>Total Contract/Project Dollar Value:</b>   | <b>Period of Performance:</b>  |
| <b>Client Contract Contact:</b><br>Name:<br>Title:<br>Name of organization:<br><br>Address:<br><br>Telephone #:<br>FAX #:<br>Email address: | <b>Client Technical Contact:</b><br>Name:<br>Title:<br>Name of organization:<br><br>Address:<br><br>Telephone #:<br>FAX #:<br>Email address: |
| <b>Description of project/relevance:</b>  |  |
| <b>Description of problems/cost overruns for this project:</b>  |  |

**CONTRACT EMPLOYEE REFERENCES**

|   |  |
|---|--|
| <b>Contract No.:</b>  | <b>Prime/Sub-Contractor Status:</b>  |
| <b>Total Contract/Project Dollar Value:</b>   | <b>Period of Performance:</b>  |
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| <b>Description of project/relevance:</b>  |  |
| <b>Description of problems/cost overruns for this project:</b>  |  |