



**Chicago Teachers' Pension Fund**

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**REQUEST FOR PROPOSALS**

**STAFF AUGMENTATION SERVICES**

**No. FY2023-0002**



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## **I. Summary**

This Request for Proposal (“RFP”) is being issued by the Public School Teachers’ Pension and Retirement Fund of Chicago (“CTPF” or the “Fund”) (the Fund or “CTPF”) to solicit proposals from qualified organizations (“Bidder” or “Consultant” or “Firm” or “Proposer” or “Contractors”) to provide Professional and Information Technology Staff Augmentation Services. The responsive and responsible Contractors will be included in a pool of providers that will provide services to support a large multi-year CTPF project. CTPF invites proposals from qualified Contractors. Proposers must satisfy the qualifications and requirements outlined herein.

A proposer’s preparation and submittal of a proposal or subsequent participation in presentations or contract negotiations creates no obligation on the Fund to award a contract or to pay any associated costs. CTPF will retain all proposals and related materials which will be subject to disclosure as required in accordance with the Illinois Freedom of Information Act.

## **II. Background**

Established by the Illinois General Assembly in 1895 as the Public School Teachers’ Pension and Retirement Fund of Chicago, CTPF administers a multi-employer defined benefit public employee retirement fund. CTPF is administered in accordance with Illinois Compiled Statutes (ILCS) Chapter 40, Articles 1, 17, and 20.

CTPF is governed by a Board of Trustees made up of twelve (12) members. The Board of Trustees oversees the Fund’s benefit programs, approves all benefits, makes investment decisions, and provides general operational oversight.

For more information about the Fund, please visit [www.ctpf.org](http://www.ctpf.org).

## **III. Scope of Services**

### **General Overview of Project**

CTPF has entered into a multi-year agreement with Sagitec Solutions to implement their NEOSPIN application at CTPF. A need has been identified by CTPF to augment the capacity of its Professional and Information Technology staff with temporary technical professional personnel employed by third party vendors possessing specialized knowledge. The staff augmentation will enhance CTPF’s ability to perform its daily operations with minimal disruption, while simultaneously minimizing risk to CTPF during the implementation.

CTPF is seeking to supplement its permanent staff with temporary technical professionals on an as-needed basis. Multiple Contractors providing staff augmentation services across many disciplines are desired for this effort. These temporary resources will assist Fund staff by participating in the implementation of a new Pension Administration System (PAS) and/or providing continual enhancements, and/or ongoing system maintenance to the existing PAS. The objective of this Request for Proposal is to solicit from qualified vendors competitive proposals containing sufficient detail for a

comprehensive and holistic evaluation of written submissions resulting in a contract(s) to provide CTPF with staff augmentation services.

### **Type of Services**

CTPF is seeking to identify and retain Contractors that are able and willing to provide staff augmentation services for the positions outlined in **Appendix E** and related to the current Information Technology Pension Administration System Replacement effort referred to as **Project 125**. CTPF may reject a written submission should it be deemed, based upon reasonable criteria, that the Proposer presents a direct conflict of interest to the CTPF's Project 125. In the event a Proposal is rejected pursuant to this conflict, a written statement will be issued to the respective Proposer.

### **Type of Contracts**

Individual Master Services Agreements (MSA) will be awarded to each successful Contractor containing the terms and conditions of the services to be rendered by the staffing augmentation Contractor(s). This MSA will provide for multiple awards, indefinite-delivery; indefinite-quantity (IDIQ) task-order based contracts. Thereafter, CTPF will issue subsequent Statement of Work for Temporary Personnel Requisitions (SOW-TPR) for individual staffing requirements. CTPF intends to award multiple Contracts under this procurement.

### **Location of Service**

All required Contract Services must be performed within the United States. Individual SOW-TPRs may require Contract Services be performed at the CTPF office or may allow for the work required in the SOW-TPR to be performed remotely. The location of work will vary contingent upon the needs of the CTPF hiring manager. No guarantee of the availability of remote work is provided. The hourly rate will remain unchanged regardless of the location of the work performance, onsite or remotely.

CTPF will provide adequate workspace and access to CTPF's computer network for services performed onsite. The CTPF office is located at:

425 S. Financial Place  
Suite 1400,  
Chicago, IL 60605-1000

### **Statement of Work for Temporary Personnel Requisition (SOW-TPR) Process**

**Available Pool of Candidates.** The Contractor must be capable of providing experienced and qualified technical and professional personnel to perform specified SOW-TPR activities in accordance with timing requirements set forth in each SOW-TPR.

**Issuance of SOW-TPRs.** CTPF will issue SOW-TPRs in accordance with the procedures set forth below in **Appendix F, General Conditions**. The Contractor may provide, for consideration, experienced personnel who are able and willing to perform the tasks described in each SOW-TPR issued, and who meet the qualifications listed under the position descriptions set forth in **Appendix E, Position Descriptions**.

When the SOW-TPR is issued, the CTPF Director of Human Resources will also provide a deadline for submitting potential candidates. CTPF anticipates a minimum of ten (10) business days for the Contractor to identify and propose potential candidates to CTPF. Page one of the SOW-TPR will be completed by CTPF and the Contractor will complete page 2 when proposing personnel for the SOW-TPR. Please refer to **Appendix D**, Sample SOW-TPR, for an example SOW-TPR.

**Work Schedule.** Unless otherwise specified in a SOW-TPR, Contractor personnel assigned to a SOW-TPR shall maintain a work schedule consistent with CTPF normal business hours and work practices. Contractor personnel are expected to comply with all CTPF rules and operating policies pertaining to conduct in the workplace. Any change in Contractor personnel must be approved, in writing, by the CTPF Director of Human Resources and reflected in a revised SOW-TPR or otherwise in writing by CTPF.

**SOW-TPR Selection.** CTPF will issue SOW-TPRs requesting personnel for specific positions to Contractors. These SOW-TPRs will only be issued to Contractors who provided a fixed labor / hourly rate for the position being requested in the SOW-TPR. Each consultant shall submit individual candidates to the CTPF Director of Human Resources, in response to each SOW-TPR issued to be considered and selected for a SOW-TPR award. Submissions of SOW-TPR must include the following information:

A brief narrative describing the candidate's qualifications and experience in performing work of a similar nature to what is requested in the SOW-TPR.

Contractors should consider discounts of awarded bill rates whenever possible; and include the proposed hourly rate for each candidate.

Candidate's Name

Current resume for the proposed candidate

Availability to start (e.g., 2-weeks' notice)

**Notice of SOW-TPR Award.** CTPF will review submitted resumes/summaries and notify the Contractor if CTPF is interested in interviewing the proposed personnel. CTPF's notification will include proposed dates (usually within two to three days). The Contractor will coordinate with the proposed personnel and respond to CTPF within 48 hours regarding the proposed personnel's availability for phone screening. If the Contractor is unable to make the proposed personnel available within three days of the notification, CTPF may withdraw its invitation for phone screening.

**Non-Compliance with the SOW-TPR process.** Failure to comply with the procedures and requirements in this Section may result in CTPF's rejection of proposed candidates.

**SOW-TPR Termination.** Upon notice to the successful Contractor, CTPF may cancel all or part of a SOW-TPR. If CTPF cancels all or part of a SOW-TPR, the successful Contractor may be entitled to a prorated payment, upon submission of an invoice for services and deliverables satisfactorily provided in compliance with the SOW-TPR and Master Professional Services Contract. Unless otherwise requested by CTPF to complete a subsequent SOW-TPR, the successful Contractor shall have no further responsibility or liability for work identified as "in progress" as of the date of such termination.

## **Key Personnel and Labor Categories**

**Account Manager.** Contractor shall assign an Account Manager(s) as a single point of contact to manage the daily commitments of the Contract. The Contractor's Account Manager(s) shall communicate directly with the CTPF Director of Human Resources and shall communicate directly with

CTPF managers solely via Email with a copy to the Director of Human Resources. Communications to CTPF Managers shall be restricted to the performance of consultant personnel. All other communications regarding open positions, upcoming positions, backfill positions, bill rates, extensions, and anything pertaining to the Contract shall be communicated to the CTPF Director of Human Resources.

**Labor Categories.** The Contractor shall provide technical support staffing for one or more of the following labor categories. CTPF recognizes that Contractors may specialize in a specific discipline (e.g., Databases, Quality Assurance, etc.) and may not be able to provide personnel in every category. These Contractors are encouraged to submit proposals and cost estimates for the positions the Contractors believe they are able to successfully fulfill the requirements; however, each position below does not require a proposed rate.

1.	Agile Project Manager
2.	Senior Agile Project Manager
3.	Business Systems Analyst
4.	Senior Business Systems Analyst
5.	Database Administrator
6.	Senior Database Administrator
7.	Quality Assurance and Test Analyst
8.	Senior Quality Assurance and Test Analyst
9.	Software Developer
10.	Senior Software Developer
11.	Technical Systems Architect
12.	Senior Technical Systems Architect
13.	Technical Writer
14.	Business Process Engineer
15.	User Interface Designer
16.	Change Management Analyst
17.	Data Analyst
18.	Sr. Data Analyst
19.	Technical Trainer

#### IV. TIMELINE

EVENT	DUE DATE
RFP Distribution	Monday, August 29, 2022
Optional Bidders' Conference. Please contact Lupe Garcia for meeting link. <a href="mailto:Garciam@ctpg.org">Garciam@ctpg.org</a>	Thursday, September 1 , 2022, 1:00 PM
Written questions due from Proposers	Wednesday, September 7, 2022, 12:00 p.m. (CDT)
Compilation of questions and answers posted to <a href="http://www.ctpf.org">www.ctpf.org</a>	Tuesday, September 13 , 2022
RFP Due Date	Friday, September 23, 2022 12:00 p.m. (CDT)

#### V. CONTACT

Any questions concerning this RFP must be directed to:

Names	Lupe Garcia, Counsel Sandy McNamara, Paralegal and Contract/Procurement Analyst <i>(Direct all communications to the two above-referenced parties)</i>
Address	Chicago Teachers' Pension Fund 425 S. Financial Place Suite 1400 Chicago, IL 60605-1000
Phone Numbers	312-604-1119 <i>(Lupe Garcia)</i> 312-604-1251 <i>(Sandy McNamara)</i>
Email Addresses	<a href="mailto:garciam@ctpf.org">garciam@ctpf.org</a> <a href="mailto:mcnamaras@ctpf.org">mcnamaras@ctpf.org</a> <i>(All emails sent to all above-referenced parties)</i>

#### VI. TERM OF ENGAGEMENT

The term of the engagement shall be for up to 1 (one) year, including the option to renew for up to four (4) one year terms. The option periods may be exercised only by CTPF, in its sole and absolute discretion, and will be governed by the negotiated contract or agreement, as limited by the Illinois Pension Code and CTPF's administrative rules.

## VII. SUBMISSION GUIDELINES

In order to be considered for selection, proposals must be received via email, in PDF format, by Lupe Garcia at [garciam@ctpf.org](mailto:garciam@ctpf.org) with a copy to Sandy McNamara at [mcnamaras@ctpf.org](mailto:mcnamaras@ctpf.org) no later than **12:00 p.m. (CDT) on Friday, September 23, 2022.** (Late submissions will be rejected as unresponsive). Paper submissions will be rejected as non-conforming. An email confirmation will be sent to the Proposer upon receipt of the proposal.

## VIII. PROPOSAL CONTENT AND FORMAT

All information requested in the RFP must be addressed in the Proposer's submission. Proposals shall provide a concise explanation of Proposer's qualifications and the proposed services to be rendered. Emphasis should be placed on completeness and clarity of content. Each proposal must be submitted in response to categories A through J outlined below and must be clearly labeled as such.

### A. Cover Letter

- a. Briefly state the Proposer's understanding of the work requested and a statement why the Proposer believes it is qualified to perform the engagement. The letter should be signed by the representative of the Proposer authorized to contract on behalf of the Proposer.

### B. Title Page

- a. Date
- b. Subject
- c. Proposer's name and chief executive officer (or the equivalent)
- d. Proposer's address
- e. Proposer's website address
- f. Proposer's phone number
- g. Proposer's fax number
- h. Contact's name
- i. Contact's title
- j. Contact's phone number
- k. Contact's email address

### C. Table of Contents

### D. Contractor's Team (specific individuals responsible for performance of contract e.g., administrative staff, Talent recruiters, etc.).

- a. Identify and provide a detailed description of the Proposer's team anticipated to provide services identified in Section III above, including the following information:
  - i. The identity of the individuals; the areas of staff augmentation in which each specializes; the number of years of experience in such areas; the extent to which each has provided advice on projects relevant to the purpose of this RFP.
- b. Provide a detailed description of the experience and participation in the field of staff augmentation by each identified member of the team including any provision of services to other pension funds similar in nature to that described in Section III.



- c. Provide the names and contact information for public pension fund clients of the Proposer that have utilized its services for work similar to that covered by this RFP who may be contacted as references.

**E. Billing Proposal**

- a. Proposers must submit their fee proposal in the format prescribed in **Appendix G**. Any deviation from the prescribed format, which in the opinion of CTPF is material, may result in the rejection of the proposal. The fixed labor-hour prices should be fully loaded and must include wages, overhead, general, and administrative expenses, travel costs, taxes, and profit for each labor category. These rates should be consistent regardless of where the work is performed e.g., whether on-site or remote.
- b. If CTPF does not consider the submitted price proposal to be fair and reasonable, and it cannot negotiate an acceptable price, CTPF shall reserve the right to cancel the award and take appropriate action to meet its needs. CTPF will determine whether the cost is fair and reasonable by considering the proposal, including the proposer's qualifications, the price proposed, other known prices, the project budget, and other relevant factors.
  - i. State any special considerations with respect to billing or payment of fees and expenses that Proposer offers and that it believes would differentiate its submission from other proposals and proposes services which are more cost-effective to the Fund.
  - ii. CTPF expects the lowest rate charged by Proposer for its governmental and non-profit clients. If for any reason Proposer is unwilling or unable to charge the lowest rate, please explain why.
- c. The billing rates offered in the Proposer's written submission shall be fixed, in accordance with the rates proposed in **Appendix G**, Fee Proposal for the term of this engagement.
- d. The pricing associated with a SOW-TPR will be in accordance with the fixed hourly labor rates submitted by the Proposer. These fixed hourly labor rates will be supplied in the Contractor's proposal, in the form of the Fee Proposal, **Appendix G**. The fixed labor / hourly rates must be fully burdened and must include all wages, overhead, general and administrative expenses, travel, taxes (including all sales and use taxes) and profit for each category of labor / job title.

**F. Contractor's Background, Qualifications, and Experience**

- a. Briefly describe Proposer's background, history, and ownership structure, including any parent, affiliated or subsidiary company, and any business partners. The Contractor must be regularly established in the industry of providing the services outlined in Section III. Scope of Work, and have experienced administrative personnel able to provide the required services. CTPF may request information substantiating the above requirements. Failure to provide this information may result in a Proposer's submission being declared non-responsive.
- b. Provide the size of the Contractor including number of offices and number of full-time employees. Identify the key administrative personnel proposed for the CTPF engagement, emphasizing specific experience on contracts similar in scope to the requirements of this RFP. Describe his or her position, current responsibilities, and areas of expertise, experience, education, professional designations, and memberships.
- c. Provide the number of years that the Contractor and any identified administrative personnel have been providing the services requested in this RFP.
- d. Provide details regarding the Contractor's employee benefit industry experience/expertise.

- e. Will your organization use outside contractors (subcontractors, other than the temporary staff assigned to CTPF) for this engagement? If so, what confidentiality agreement is in place to protect sensitive information from disclosure? What allocation of the scope of services will be assigned to outside contractors (subcontractors)?
- f. Indicate Proposer's due diligence process in hiring, evaluating, and monitoring its staff and contractors, as applicable.
- g. List any known professional or personal relationships Proposer's or its employees or contractors may have with individual CTPF Board members and/or Fund staff.
- h. Identify any potential or actual conflicts of interest you have in providing services to CTPF. State whether you have ever provided services to CTPF, the City of Chicago, the Chicago Board of Education ("Chicago Public Schools" or "CPS"), the Chicago Teachers' Union ("CTU"), the Retired Teachers' Association of Chicago ("RTAC"), the Chicago Principals and Administrators Association ("CPAA"), any Chicago charter school, or any employee group or trade organization related to the aforementioned entities. If so, please state the name of each such client or former client, contact information, and the nature and time frame of such representation. In providing such information you consent to and agree to release CTPF from any liability that may result from contacting such client(s) and communicating with such client(s) about your prior engagements, and soliciting an opinion regarding the work performed for such reference. In addition, please state how you intend to resolve any potential or actual conflict of interest.
- i. Identify all public sector or ERISA fund clients who have terminated their working relationship with you in the past five (5) years and provide a brief statement of the reason(s) for the termination. Provide each client's contact information. You consent to and hereby release CTPF from any liability that may arise from contacting your former client(s) and communicating with them about the work you performed and the reason for your termination.

**G. Insurance, Liability, Confidentiality, and Litigation**

- a. What assurances can you provide that your Firm will not be subject to cyber-attacks? Describe security and protection measures and provide copies of any and all related policies.
- b. Describe your expected response time to notify us if a cyber-attack or security breach should occur and the actions you would take to mitigate damages.
- c. Please describe the levels of your professional liability insurance coverage for client security breaches (cyber risk) and any fiduciary or professional liability insurance your Firm carries. Is the coverage on a per client basis or is the dollar figure applied to the Firm as a whole? List the insurance carriers.
  - i. What limitation on liability, if any, do you impose through your contract? The organization must not seek to unreasonably limit its liability for negligence.
  - ii. Are you bonded?
  - iii. Does coverage for liability, due to your negligence, continue for a period following termination of the contract? If so, for how long?
  - iv. Identify the amount, type of coverage, deductible, and any coinsurance.
- d. What is the organization's policy on confidentiality during and after the engagement?
- e. Has your organization ever been involved in a lawsuit in the last ten (10) years involving any services provided by the Contractor? If so, provide details, including description of the lawsuit, dates, and outcomes.
- f. Has your organization, related entities, affiliates, principals, and/or officers been a party in any material civil or criminal litigation, or subject to investigation, disciplinary action, or regulatory

review, whether or not directly related to services requested by this RFP? If so, provide details, including dates and outcomes.

- g. Describe any anticipated litigation in which your company may be involved.

**H. Sample Contract or Agreement**

- a. Please provide your proposed Master Professional Services Agreement for negotiation purposes.
- b. Provide additional details, if any, that we should be aware of regarding your contracting process.

**I. References**

- a. Please provide three references who are clients for whom you have performed work like that requested in this RFP. Include the reference name, title, entity, address, telephone number, and description of the services provided.
- b. In providing such information, you consent to and hereby release CTPF from any liability that may arise from contacting your references and communicating with such references about your prior engagements and soliciting an opinion regarding the work performed for such reference.

**J. Required Disclosures**

- A. All Proposers must provide answers to each written disclosure requested below in categories (i) through (ix) as part of their RFP response. Note that VIII(J)(a)(vi) below requires completion of the EEOC chart attachment to this RFP. Failure to provide answers to each disclosure question or failure to provide the completed EEOC chart may cause your proposal to be deemed non-responsive. Proposers should use “none” or “not applicable” as appropriate, but a response must be provided for each disclosure category below. Your disclosures must be clearly labeled as “J. Required Disclosures.”

- (i) The Proposer must disclose, labeling each category, separately: (a) any entity that is a parent of, or owns a controlling interest in, the Proposer, (b) any entity that is a subsidiary of, or in which a controlling interest is owned by, the Proposer, (c) any persons or entities who have an ownership or distributive income share in the Proposer that is in excess of seven and one-half percent (7.5%), and (d) any persons who serve as executive officers of the Proposer, including their titles.
- (ii) The Proposer must disclose, separately: (a) any direct or indirect payments in excess of \$1,000 per calendar year within the prior five (5) calendar years made to any community or not-for-profit organization relating to public education by: (i) the Proposer, (ii) any executive officer of the Proposer, (iii) any parent entity of the Proposer, (iv) the executive officers of any entity that is a parent of, or owns a controlling interest in, the Proposer, and (v) any Shareholder of Proposer with ownership or a distributive income share in the Proposer that is in excess of seven and one-half percent (7.5%); (b) any formal involvement with any community or not-for-profit organization relating to public education by any person or entity identified in (a) above; and (c) any involvement as a member or director of a charter school that contributes to the Fund of any person or entity identified in (a) above. For purposes of this

Section VIII(J)(a)(ii) and (iii), "Shareholder" shall mean any person who has an ownership or distributive income share in the Proposer.

- (iii) The Proposer must disclose if: (a)(i) any executive officer of the Proposer, (ii) any parent entity, (iii) the executive officers of any entity that is a parent of, or owns a controlling interest in, the Proposer, and (iv) any Shareholder of the Proposer with ownership or a distributive income share in the Proposer that is in excess of seven and one-half percent (7.5%) has given any direct or indirect financial support in excess of \$1,000 per calendar year within the prior five (5) calendar years or (b) whether the persons or entities identified in (a) above have had any formal involvement within the prior five (5) calendar years with a community or not-for-profit organization with a central purpose of influencing public policy related to budgetary and fiscal policy which directly or indirectly relates to the continued availability and long-term viability of defined benefit pensions in the public sector, to education policy, or to retirement security policy.

For the purposes of this disclosure, an organization has the "central purpose" of influencing policy if it is understood with the exercise of reasonable due diligence, including but not limited to the examination of the organization's IRS filings and other publicly-available statements of purpose, that the organization intends to affect policy or engage in lobbying or other advocacy activity. A Proposer is not required to disclose contributions to organizations that engage in such activities in furtherance of providing medical research, aid to the poor, disaster relief, or other such tangible goods or service. The Trustees have determined that the following organizations presently fall under this required disclosure:

American Enterprise Institute,  
American Legislative Exchange Council,  
Brookings Institution,  
California Common Sense,  
California Policy Center,  
Civic Committee of the Commercial Club,  
Heritage Foundation,  
Howard Jarvis Taxpayers Association,  
Illinois Municipal League,  
Illinois Policy Institute,  
Independent Institute,  
Jessie Ball DuPont Fund,  
Laura and John Arnold Foundation,  
Mackinac Center for Public Policy,  
Manhattan Institute for Policy Research,  
Massachusetts Taxpayers Foundation,  
Mercatus Center at George Mason University,  
National Council on Teacher Quality,  
National Institute for Labor Relations Research,  
Nelson Rockefeller Institute of Government,

National Taxpayers United of Illinois,  
Pioneer Institute,  
R Street Institute,  
Reason Foundation,  
Show Me Institute,  
State Policy Network,  
StudentsFirst,  
Taxpayers for Sustainable Pensions,  
Taxpayers United of America,  
Teacherspensions.org,  
Texas Public Policy Foundation,  
The Future of Freedom of Foundation,  
The Pew Charitable Trust,  
UnionWatch,  
Urban Institute,  
Wyoming Liberty Group, and  
Any state or local affiliates or chapters of the above organizations.

- (iv) The Proposer and any parent, controlling entity, subsidiary, or affiliate must disclose any direct or indirect financial relationships, transactions, or consulting agreements with the Chicago Board of Education entered into within the prior five (5) calendar years. Any such direct or indirect financial relationships, transactions, consulting agreements, or consulting-related contracts with the Chicago Board of Education entered into on or after the execution of an agreement shall be identified in an amended Proposer Disclosure within thirty (30) calendar days of any new relationship, transaction, investment, agreement, or contract with the Chicago Board of Education.
- (vi) The total number of staff employed by Proposer to fulfill the professional services of staff augmentation (this not refer to the temporary professional employees). The number of Proposer's staff and percentage of its staff, broken out separately for each category, who are (1) a minority person, (2) a female, or (3) a person with a disability. This information must be provided using the EEOC chart available on CTPF's website. Supplemental information to the EEOC chart is welcome.
- (vii) The number of current contracts, excluding temporary professional employees, that the Proposer has with a (1) minority owned business, (2) female owned business, or (3) business owned by a person with a disability.
- (viii) The number of current contracts that the Proposer has with a business other than (1) a minority owned business, (2) a female owned business, or (3) a business owned by a person with a disability, under which, while the business is not owned by one of the above categories, where more than fifty percent (50%) of services performed pursuant to the contract are performed by (1) a minority person, (2) a female, or (3) a person with a disability.
- (ix) The Proposer shall agree to annually disclose various EEO data and diversity of its contracts with third party vendors as required by the Fund.

**K. Exhibits and Attachments**

Any additional information or exhibits appropriate for CTPF’s consideration may be included under this category.

**IX. WRITTEN QUESTIONS**

Proposers who have questions regarding this RFP may email the contacts listed above by the due date listed in the timeline above for written questions. Please reference “Staff Augmentation Services RFP Questions” in the subject line of the email. The questions (without identification of the questioner) and the answer will be posted on the CTPF website according to the above timeline.

**X. PROPOSAL EVALUATION**

The following guidelines will be used to analyze and evaluate all proposals. All proposals will be reviewed to determine if they contain all the required submittals specified in this RFP. Those not submitting all required information in the prescribed format will be rejected. CTPF reserves the right to evaluate all factors deemed appropriate, whether or not such factors have been stated in this section.

**A. QUALIFICATIONS**

In order to be selected for this engagement, the Proposer must demonstrate that it can meet the requirements of the RFP and the scope of work contained in the RFP.

The Proposer must be regularly established in the industry of providing Recruitment and Staffing services and must provide detailed information in response to Section VIII (f) Contractor’s Background, Qualifications, and Experience. CTPF may request information substantiating the above requirements.

The Contractor’s team may consist of individuals with in-depth experience across multiple business areas including, Information Technology, Finance, Auditing, Customer Service, public pension plans and Healthcare Insurance plans.

Failure to provide this information may result in a Proposer’s proposal being deemed non-responsive.

**B. REVIEW OF PROPOSALS**

Any contract award is ultimately a decision of the Board of Trustees and is not to be based on the evaluations, scoring, or recommendations by the Evaluation Committee.

- a. An Evaluation Committee consisting of Fund staff will evaluate all proposals received.
- b. The Committee will determine if Proposers meet the mandatory requirements listed below:
  - i. The Proposer has no conflict of interest with respect to any other work performed by the Proposer.

- ii. The Proposer must demonstrate that it can meet the requirements of the RFP and the Scope of Work contained in this RFP.
- iii. The Proposer must adhere to the instructions in this RFP.
- iv. The Proposer must follow the proposal content and format outlined in Section VIII.
- v. The Proposer must provide all disclosures requested in Section VIII(J)(a).
- c. Factors to be considered by the Committee members include, but are not limited to:
  - i. Qualifications to perform the services requested;
  - ii. Price;
  - iii. Responses to the Proposal Content in Section VIII; and
  - iv. Presentation to the Committee (if applicable).

This RFP is not an offer of a contract. Acceptance of a proposal does not commit CTPF to award a contract to any Proposer, even if the Proposer satisfied all requirements stated in this RFP. Publication of this RFP does not limit CTPF's right to negotiate for the services described in this RFP. CTPF reserves the right to choose to not to enter into an agreement with any of the Proposers to this RFP. The information submitted in response to this RFP becomes the exclusive property of CTPF.

CTPF may award multiple contracts resulting from this solicitation to those Proposers submitting terms deemed most advantageous to CTPF, price and other factors considered. The following factors, which are listed in descending order of importance, shall be used to compare Proposals:

- i. technical,
- ii. past performance and
- iii. price

## **XI. RFP WITHDRAWAL OR MODIFICATION**

Proposals may be withdrawn or modified by a written or email request prior to the RFP due date. CTPF may, by written notice to all Proposers, cancel, postpone, or amend the RFP prior to the due date. If CTPF decides, at its sole discretion, that the revision or amendment will require additional time for response, the due date will be extended for all Proposers.

## **XII. INCOMPLETE PROPOSALS**

CTPF reserves the right to request additional information or to reject the proposal outright if the information provided in a Proposer's proposal is deemed to be insufficient for evaluation. False, incomplete, or unresponsive statements in connection with a proposal may be sufficient cause for its rejection. The evaluation and determination of the fulfillment of the requirements will be determined by CTPF and such judgment shall be final.

Proposers that include material deviations from, or take material exceptions to RFP requirements will be deemed technically unacceptable, and may be disqualified from consideration for an award unless CTPF subsequently amends the RFP to modify the requirements. Proposals that merely repeat the requirements set forth in the RFP and state that Proposer "will perform the SOW-TPR" or similar response will be

considered technically unacceptable and may not receive further consideration. CTPF is solely interested in proposals demonstrating the Proposer's expertise in performing engagements of this type as illustrated by the Proposer's description of how it proposes to perform the requirements set forth in this RFP.

Proposals submitted shall be valid for one hundred twenty (120) days following the closing date noted above. CTPF and the Proposer may extend this period by mutual written agreement. If a solicitation is cancelled before the due date, the offer will be returned to the Proposer who submitted the response.

### **XIII. SELECTION OF WINNING BID**

A Contract Award resulting from this RFP will be based upon the most responsive Proposer(s) whose offer(s), in the sole discretion of the Board of Trustees, are the most advantageous to CTPF in terms of the Proposer's submission, including, but not limited to qualification, meeting contract requirements, cost, and other factors as specified in this RFP.

1) **Technical.**

The technical factors listed below will be considered in descending order of importance:

- a) Technical Approach
- b) Recruiting
- c) Capabilities
- d) Experience

2) **Past Performance.**

Past performance will be evaluated to assess the risks associated with a Proposer's performance. Consideration will be noted of the relevance and quality of the Proposer's past performance on past or current contracts for the same or comparable services. The Proposer's past performance will be evaluated based on the Proposer's discussion of its past performance for similar efforts, information obtained from past performance references and information that may be obtained from any other sources, including government databases and contracts listed in the Proposal that are not identified as references.

3) **Price Evaluation.** CTPF will evaluate price based on each individual labor category in the fee proposal. Price is only one evaluation factor and CTPF may not award a Contract based solely upon the lowest priced proposal. CTPF will also consider the size of a company, its name recognition, geographical offerings and the expertise/experience of staff impact, and hourly labor rates. When considering rates, CTPF will use the rates of similarly situated companies for reasonableness and comparison purposes. Price may become a more important selection factor if the ratings for the non-price factors are the same or very close. CTPF will also evaluate whether the proposed prices are realistic (e.g., reasonably sufficient to perform the requirements) and reasonable. Proposals containing prices that are determined to be unrealistic or unreasonable will not be considered for award.

4) **Responsibility Determination.** CTPF will only award Contracts to responsible Proposers. CTPF will make a responsibility determination based on any available information, including information submitted in a Proposer's submission. In making a responsibility determination, CTPF will consider whether:

- a) Proposer has sufficient resources to perform the contract;
- b) Proposer has a satisfactory record of performance, integrity and business ethics;



- c) Proposer has the accounting systems and internal controls, quality assurance processes and organizational structure and experience necessary to assure that contract work will be properly performed and accurately invoiced;
- d) Proposer has the facilities, technical and personnel resources required to perform the contract;
- e) Proposer is not excluded from contracting with a government entity or State of Illinois Agency.

After evaluation of the proposals and approval by CTPF, all Proposers will be notified of the result. Contract negotiations will commence with the selected Contractor.

#### **XIV. REIMBURSEMENT FOR PROPOSAL PREPARATION**

CTPF will not reimburse any expenses incurred in responding to this RFP including, but not limited to, the costs of preparing the response, providing any additional information, or making a presentation or presentations. CTPF reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.

#### **XV. QUIET PERIOD**

During the RFP review period (which begins on the date the RFP is posted on CTPF's website) to and until a contract is executed, there shall be no communication between Proposers and CTPF's Board members or Fund staff (other than the RFP contact listed in Section V or his or her designee) regarding any product or service related to the search. Proposers may communicate with the Contract and Procurement Administrator or her designee solely regarding administrative questions relating to the procurement process. All other questions must be asked and will be responded to through the RFP question and answer process.

The quiet period shall not prevent customary Proposer due diligence initiated by CTPF, or communications with a current service provider who happens to be a , provided that any such communication must be in the ordinary course of business and necessary for the provision of current services provided by such service provider. Discussions relating to the pending selection are strictly prohibited.

#### **XVI. RFP LIMITATIONS AND CONDITIONS**

- A. This RFP does not commit CTPF to award an agreement or procure services of any kind whatsoever. CTPF reserves the right, in its sole discretion, to negotiate with any or all applicants considered, or to postpone, delay, or cancel this this RFP, in whole or in part. CTPF may terminate discussions, in its sole discretion, or select another finalist(s). CTPF reserves the right to award an agreement or agreements based upon the proposals received. The Contractor should not assume that there will be an opportunity to alter or amend its proposal at a later date or at the time of contract negotiations.
- B. CTPF may request that Proposer clarify the content of the proposal. Other than for purposes of clarification, no Proposer will be allowed to alter or amend its proposal after the RFP due date.
- C. All materials submitted in response to this RFP shall be the sole property of CTPF. CTPF reserves the right to use any and all ideas submitted in the proposals.

- D. CTPF reserves the right to reject or cancel in whole or in part at any time, any and all proposals received; to waive minor irregularities; to negotiate in any manner necessary to best serve CTPF and to make a whole award, multiple awards, a partial award, or no award.
- E. CTPF reserves the right to reject any or all offers and to discontinue this RFP process without obligation or liability to any potential vendor.
- F. CTPF reserves the right to reject the proposal of any Proposer who is not currently able to perform the contract. CTPF reserves the right to award a contract, if at all, to the Contractor(s) which will provide the best match to the requirements of the RFP and the needs of the Fund, which may not be the proposal offering the lowest fees. CTPF may take into consideration any factor it deems relevant, including but not limited to, past experience, financial stability, the ability to perform the requirements as set forth in this RFP, or previous failure to perform similar contracts in accordance with the terms, or in a timely manner, and other relevant criteria. CTPF is not required to accept for consideration any proposal that fails to address or does not comply with each of the requirements or the criteria set forth in this RFP.
- G. CTPF reserves the right to award a contract(s) on the basis of initial offers received, without discussions or requests for best and final offers. Conversely, CTPF reserves the right to request best and final offers.
- H. Any contract award is ultimately a decision of the Board of Trustees and is not required to be based on the evaluations, scoring, or recommendations by the Evaluation Committee.
- I. If Proposer submits a proposal, CTPF reserves the right to conduct its own due diligence and to undertake such investigations as it deems necessary to determine Proposer's satisfaction of the qualifications and ability to furnish the required services. Upon request, Proposer agrees to provide any and all information for this purpose.
- J. CTPF reserves the right to request additional documentation or information from Proposers. Requested information may vary by Proposer. CTPF may ask questions of any Proposer to seek clarification of a proposal to ensure the Proposer understands the scope of the work or other terms of the RFP.
- K. CTPF does not guarantee or commit to contracting any specific number of projects to Proposer during the life of the agreement.
- L. Written approval from CTPF will be required for any news releases regarding the award of contract.
- M. CTPF reserves the right to amend any segment of the RFP prior to the announcement of selected firms. In case of such amendment, all qualified responders will be afforded the opportunity to revise their proposals to accommodate the RFP amendment

## **XVII. MINORITY AFFILIATION**

CTPF is an equal employment opportunity employer, and endeavors to increase the utilization of vendors who are MWDBE companies. Please provide any information relative to your Contractor's minority Contractor affiliations or minority Firm participation in the engagement, and a MWDBE breakdown for your Firm. Please also provide any MWDBE subcontractors/subvendors that Proposer intends to use on this contract, including the name, role, and expected payments and percentage utilization.

## **XVIII. WAIVER OF CLAIMS**

By submitting a proposal, the Proposer agrees to waive any claim it has or may have against CTPF, its Board of Trustees, and/or CTPF officers, employees, and agents arising out of or in connection with the administration, evaluation, or recommendation of any proposal, the waiver of any requirements under the RFP, the acceptance or rejection of any proposal, and/or the award of the contract.

## **XIX. CONTRACT NEGOTIATIONS**

Once the Contractor(s) has been selected to perform the services, the parties will begin negotiating the terms of the engagement. CTPF does not anticipate or desire a lengthy negotiation. CTPF may, in its sole discretion, terminate negotiations and proceed to engage another party for such services, whether or not that party was a Proposer, if the parties are unable to expediently negotiate an agreement or reach a bargaining impasse.

## **XX. NOTICE REGARDING ILLINOIS PUBLIC RECORDS LAWS**

The proposal that you submit will be subject to the Illinois Freedom of Information Act (5 ILCS 140/) "FOIA Act"). The FOIA Act provides generally that all records in the custody or possession of a public body are presumed to be open to inspection or copying. Any public body that asserts that a record is exempt from disclosure has the burden of proving by clear and convincing evidence that such record is exempt from disclosure. CTPF will determine, in its sole discretion, whether the materials are subject to public disclosure, if a request is made in accordance with the FOIA Act for materials submitted in response to this RFP. If CTPF denies a public records request based on a Proposer's representation that such information is proprietary, privileged, and/or confidential, Proposer, by submission of a response to this RFP making these proprietary, privileged, and/or confidential assertions, agrees to reimburse CTPF for, and to indemnify, defend, and hold harmless CTPF, its officers, Trustees, fiduciaries, employees, and agents from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to CTPF's complete or partial FOIA denial based on Proposer's assertions. By submitting your proposal, you further agree to indemnify, defend (at CTPF's discretion), and hold CTPF harmless from and against any and all Claims arising from or relating to CTPF's complete or partial disclosure of your proposal if CTPF determines, in its sole discretion, that such disclosure is required by law, or if disclosure is ordered by a court of competent jurisdiction.

## **XXI. MOST FAVORED TERMS**

All prices, terms, warranties, and benefits offered by the Proposer in its proposal must be comparable or better than those offered by the Proposer in agreements with substantially similar governmental or quasi-governmental clients. Should the Proposer make available more favorable terms to a substantially similar governmental or quasi-governmental client with respect to the types of services set forth in Proposer's proposal, Proposer will make such prices, terms or conditions available to CTPF.

## **XXII. AGREEMENT AND APPROVAL**

The Fund may select one or more Contractors to provide the services described herein. To the extent one or more Contractors are selected, CTPF will work to negotiate an agreement with the selected Contractor (s), giving due consideration to the stipulations in the Contractor's(s') submitted standard agreement.

The selected Contractor(s) shall be required to assume full responsibility for all services and activities offered in its/their proposal whether or not provided directly. Further, CTPF will consider the selected Contractor(s) to be the sole point of contact with regard to contractual matters, including payment of fees.

The selected Contractor(s) and its/their personnel, including subcontractors, shall treat any and all information provided by CTPF as confidential and is/are prohibited from using that information for any other purposes than those provided by contract, without CTPF's express written consent. The selected Contractor(s) shall not use a subcontractor without CTPF's express written consent. All terms and conditions of a contract with the selected Contractor(s) shall be equally binding on any subcontractors.

The selected Contractor(s) shall meet specific performance standards established during the contract negotiation process. The approved project schedule, specifying agreed upon, significant milestone events, and a project completion date, shall be incorporated into the contract as projects are identified and assigned to the successful Proposer(s) by CTPF.

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# TABLE OF APPENDIXES

<b>Appendix</b>	<b>Description</b>
A	REMOVED
B	Qualifications
C	Questionnaire
D	Sample SOW-TPR
E	Position Descriptions
F	General Conditions
G	Fee Proposal

## Appendix B: Qualifications

CTPF is seeking a Staff Augmentation Contractor to provide temporary professional personnel with the following skill sets (experience and qualifications). Indicate the skillsets for which your firm can provide staffing resources by placing an "X" in the respective box below.

	Agile Project Manager
	Senior Agile Project Manager
	Business Systems Analyst
	Senior Business Systems Analyst
	Database Administrator
	Senior Database Administrator
	Quality Assurance and Test Analyst
	Senior Quality Assurance and Test Analyst
	Software Developer
	Senior Software Developer
	Technical Systems Architect
	Senior Technical Systems Architect
	Technical Writer
	Business Process Engineer
	User Interface Designer
	Change Management Analyst
	Data Analyst
	Sr. Data Analyst
	Technical Trainer

---

Contractor Representative Signature

Date

## Appendix C: Questionnaire

The following questionnaire must be completed and included with Contractor's proposal. Please insert text in the same format as the questionnaire, listing the question first followed by your answer.

### Vendor Information

Name of Vendor: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Employer Identification Number: \_\_\_\_\_

Contact Person(s):

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Title: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

### Clients

Provide the name, address, phone number, contact name of three clients where your firm provided services like those in this RFP.

### Proposed Services

Provide a narrative describing the way your firm will identify and screen potential candidates to ensure that they can meet the needs of CTPF in performing work like the services described in this RFP.

Describe in detail prior or current projects that are like the work required in this RFP.

### Technical Considerations

The Proposal must include the following:

**Technical Approach.** An in-depth discussion of Proposer's technical approach to providing staff augmentation services along with a clear statement of whether the Proposer's performance of the Contract will comply with all requirements, Terms and Conditions set forth in the RFP. Proposer must submit a detailed response to this RFP. The Proposer must clearly state whether it will comply with all requirements set forth in the RFP, and provide detailed information about how it will fulfill the

requirements of the RFP. Any deviations from, or exceptions to, the requirements, Terms or Conditions contained in this RFP must be clearly identified.

**Capabilities.** Describe Proposer's capabilities for performing the Contract, including back-office personnel resources and management capabilities. If applicable, describe how subcontractors or partners are used and how rates are determined when using subcontractors.

**Recruiting.** Proposers shall describe in detail their process for recruiting, screening, validating and qualifying candidates. Proposers shall describe in detail their plan for recruiting individuals to fill the positions(s) identified in a timely manner.

**Experience.** Describe your firm's experience in temporary staffing on a SOW based contract. Provide examples of personnel to include types of positions and length of assignments. Describe your firm's continuous engagement activities with personnel assigned to different SOWs.

## **Past Performance**

The Proposal must include the following:

A list of up to three (3) current or recently completed contracts for similar in scope engagements to those required by this solicitation. Each entry on the list must contain:

Client's name

Project title

Period of performance

Contract value

A primary point of contact (including the telephone number and email address for each point of contact, if available)

A back-up point of contact. If a back-up point of contact is not available, please explain how CTPF may contact the client in the event the primary point of contact fails to respond

For each past performance, provide a description of the relevant performance and the name and telephone number for CTPF to contact for past performance information for each project discussed. A past performance description will consist of:

An overview of the engagement

A description of the scope of work performed

The relevance to this effort

The results achieved


Each overview shall not exceed one page

CTPF will attempt to contact past performance references identified in the proposal for confirmation of the information contained in the proposal and/or will transmit a



past performance questionnaire to the contacts identified in the Proposer's proposals. Although CTPF will follow-up with the contacts, the Proposer, not CTPF, is responsible for ensuring that the questionnaire is completed and returned by the specified date in CTPF's transmittal. If CTPF is unable to reach or obtain a reference for the project, CTPF may not consider the contact in an evaluation of past performance.

## Appendix D: Sample SOW-TPR

 Chicago Teachers' Pension Fund	<b>Statement of Work For Temporary Personnel Requisition</b>	CTPF Requisition #: <span style="border: 1px solid black; padding: 2px;">123</span> SOW Issue Date: <span style="border: 1px solid black; padding: 2px;">02/10/2022</span>
<b>Statement of Work Details</b>		
<b>Position Title:</b> <span style="border: 1px solid black; padding: 2px;">Enter the job title for the temp position</span> <b>Hiring Manager:</b> <span style="border: 1px solid black; padding: 2px;">Enter the name of the Hiring Manager</span> <b>Avg. Hours / Week:</b> <span style="border: 1px solid black; padding: 2px;">40</span> <b>Duration Of Assignment:</b> <span style="border: 1px solid black; padding: 2px;">XX months</span> <b>Preferred Start Date:</b> <span style="border: 1px solid black; padding: 2px;">02/11/2022</span> <b>Assignment Location:</b> <span style="border: 1px solid black; padding: 2px;">Onsite at CTPF and Virtual</span> <b>Work Schedule:</b> <span style="border: 1px solid black; padding: 2px;">M-F 9:00 a.m. through 4:00 p.m.</span>	<b>Department:</b> <input type="checkbox"/> Administrative Services <input type="checkbox"/> Benefit Services <input type="checkbox"/> Call Center <input type="checkbox"/> Communications <input type="checkbox"/> Data Services <input type="checkbox"/> Employer Services <input type="checkbox"/> EPMO <input type="checkbox"/> Executive Offices <input type="checkbox"/> Finance <input type="checkbox"/> Human Resources <input type="checkbox"/> Information Technology <input type="checkbox"/> Internal Audit <input type="checkbox"/> Investments <input type="checkbox"/> Legal <input type="checkbox"/> Member Education & Outreach	
<b>Role on Project 125 / Description of Work to be performed</b>		
Please enter a description of the work to be performed.		
<b>Required Skills / years of experience</b>	<b>Desired Skills / years of experience</b>	
<b>Standard Evaluation Criteria:</b>	<b>SOW specific Evaluation Criteria:</b>	
<ul style="list-style-type: none"> <li>- Conciseness of SOW Response</li> <li>- Ability to conduct work on-site at CTPF</li> <li>- Hourly Rate</li> <li>- Candidate Availability</li> <li>- Previous experience with Public Pensions</li> </ul>		
<b>Approval &amp; Acknowledgement</b>		
NAME & SIGNATURE	DATE	<i>Please submit the completed form to Human Resources.</i>
<span style="border: 1px solid black; padding: 2px;">Richard Anderson</span>	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
Director, Enterprise PMO	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
Department Head	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
<span style="border: 1px solid black; padding: 2px;">Carlton Lenoir</span>	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
Executive Director	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;">02/10/2022</span>	
Human Resources		
<i>Reverse/next section to be completed by Vendor only.</i>		
425 South Financial Place, Suite 1400   Chicago, IL 60605   Members: 312.641.4464   General: 312.604.1400   Fax: 312.641.7185		



# Statement of Work For Temporary Personnel Requisition

CTPF Requisition #: 123

SOW Issue Date: 09/10/2022

## Candidate Information - *Current Resume for the candidate being proposed must be attached.*

To be completed by vendor submitting candidate.

Name of Candidate: Candidates Name

Candidate Availability: Proposed Rate: \$ 123.00 /hour

Where does the candidate live? (City / State) City, State

If necessary, is the Candidate willing and able to travel to CTPF administrative office? No

Certification of Candidate Background Check Completion: No

Concise and Complete Detail of Candidates Qualifications and experience:

Candidate Qualifications

## Vendor Representative

Name: Vendor Representative Name

Title: Vendor Representative Title

\_\_\_\_\_  
Signature Date

*If, in the sole discretion of CTPF, it is determined that a candidate is not satisfactorily performing the requirements or objectives of a Statement of Work, upon notice from CTPF, the Agency shall immediately remove such candidate.*

*The Agency shall provide CTPF with as much notice as practicable if a candidate identified in a Statement of Work is unable perform services and complete deliverables will become unavailable for any reason before completion of such Statement of Work.*

## To be completed by CTPF

Interview Candidate? Please Sele Date Interview Conducted:

Hire Candidate: Please Sele Candidate Start Date:

## Appendix E: Position Descriptions

### 1. Agile Project Manager

#### PURPOSE OF POSITION:

The purpose of this position is to perform agile project management activities, working with cross-functional IT teams and product owners to deliver business solutions; and to provide guidance and expertise to self-organizing teams in the areas of agile/iterative planning, agile execution techniques, and cross-team coordination.

#### ESSENTIAL DUTIES:

- Developing and reporting team status and metrics to various stakeholders

- Coordinating software deployments and ensuring compliance with change control procedures

- Working as a Scrum Master, conducting and effectively participating in various scrum rituals such as sprint planning, task estimating, daily stand-ups, sprint reviews and retrospectives

- Identifying and removing impediments, preventing distractions

- Helping to cultivate and establish robust and sustainable working relationships between business and technology teams

- Fostering an environment of cross-team collaboration and teamwork

- Serving as a coach and facilitating team self-organization and self-management rather than traditional command-control/directed styles

- Encouraging an environment where the team drives progress and feels ownership for its success;

- Developing training programs, documents, and materials

- Documenting business requirements when necessary

- Participating in requirements reviews, design reviews, and change control activities

- Support the management of outsourced work, consultants, vendors, and relationships

- Other duties, as assigned

#### TECHNICAL EXPERIENCE:

- 3 to 5 years of demonstrated experience with increasingly complex software development initiatives and hands-on experience in requirements analysis and technical documentation

- 2 to 3 years of professional experience as Scrum Master and/or PM in an Agile environment and experience with project cost forecasting/budgeting/burndown

#### SKILLS REQUIRED:

- Certified Scrum Master

#### SKILLS DESIRED:

- Experience as a project manager of software application development initiatives

- Demonstrated experience managing contractors, consultant and/or vendors

- experience with application life-cycle development tools and techniques

## 2. Senior Agile Project Manager

### OVERALL PURPOSE OF POSITION:

The purpose of this position is to perform agile project management activities for complex, high profile programs and projects, working with cross-functional IT teams and product owners to deliver business solutions; and to provide expert guidance and expertise to self-organizing teams in the areas of agile/iterative planning, agile execution techniques, and cross-team coordination.

### ESSENTIAL DUTIES:

Developing and reporting team status and metrics to various stakeholders  
Working as a Scrum Master, conducting and effectively participating in sprint planning, task estimates, task sequencing, sprint reviews and retrospectives  
Assisting the team with making appropriate commitments through story selection, task definition  
Scaling Scrum to large project teams using techniques such as “scrum of scrums” to allow clusters of teams to discuss their work, focusing especially on areas of overlap and integration  
Leading the development and maintenance of team standards, tools, and best practices  
Identifying and removing impediments, preventing distractions  
Taking the leadership role in cultivating robust and sustainable working relationships between business and technology teams  
Fostering an environment of cross-team collaboration and teamwork  
Serving as a coach for other Scrum Masters and Agile Project Managers or Product Owners  
Facilitating team self-organization and self-management rather than traditional command-control/directed styles  
Encouraging an environment where the team drives progress and feels ownership for its success  
Facilitating discussion and conflict resolution  
Leading the establishment of internal review processes and technical standards  
Developing training programs, documents, and materials  
Documenting business requirements when needed  
Participating in requirements reviews, design reviews, and change control activities  
Representing the IT department in coordination with other departments  
Managing outsourced work, consultants, vendors, and relationships

### TECHNICAL EXPERIENCE:

8 to 10 years of demonstrated experience with increasingly complex software development initiatives  
3 to 5 years of experience as a Scrum Master and/or as a project manager in an Agile environment, managing contractors, consultants and./or vendors, as well as coaching and mentoring Scrum Masters or project managers

### SKILLS REQUIRED:

Certified Scrum Master is required

### SKILLS DESIRED:

Certified Product Owner

### **3. Business Systems Analyst**

#### **OVERALL PURPOSE OF POSITION:**

Work as a member of a scrum team and alongside other business analysts to identify potential business requirements. The main tasks will include performing detailed requirements analysis, documenting processes, and performing some user acceptance testing. To succeed in this role one should have a natural analytical way of thinking and be able to explain difficult concepts to non-technical users.

#### **ESSENTIAL DUTIES:**

Evaluating business processes, anticipating requirements, uncovering areas for improvement, and developing and implementing solutions.  
Conducting meetings and presentations to share ideas and findings.  
Performing requirements analysis.  
Documenting and communicating the results of your efforts.  
Effectively communicating your insights and plans to cross-functional team members and management.  
Gathering critical information from meetings with various stakeholders and producing useful reports.  
Working closely with clients, technicians, and managerial staff.  
Ensuring solutions meet business needs and requirements.  
Performing user acceptance testing.  
Updating, implementing and maintaining procedures.  
Serving as a liaison between stakeholders and users.

#### **TECHNICAL EXPERIENCE:**

5 to 7 years of experience performing the duties outlined above in a professional environment

#### **SKILLS REQUIRED:**

A minimum of 5 years of experience in business analysis or a related field.  
Exceptional analytical and conceptual thinking skills.  
The ability to influence stakeholders and work closely with them to determine acceptable solutions.  
Advanced technical skills and excellent documentation skills.  
Fundamental analytical and conceptual thinking skills.  
Experience creating detailed reports and giving presentations.  
Competency in Microsoft applications including Word, Excel, and Outlook.  
A track record of following through on commitments.  
Excellent planning, organizational, and time management skills.  
Experience working as a member of a team on large scale projects

#### **SKILLS DESIRED:**

2-3 years working in an Agile/Scrum development environment experience working with pension administration systems

#### 4. Senior Business Systems Analyst

##### OVERALL PURPOSE OF POSITION:

The Senior Business Analyst is responsible for reviewing assigned business processes from end-to-end to identify and address operational, financial and technological risks. Identify opportunities to improve efficiency. Responsibilities will include a full range of activities from leading small to mid-size projects to assisting other project managers on larger more complex projects related to operational business functions that affect team members and providers at the market level.

##### ESSENTIAL DUTIES:

Demonstrate up-to-date expertise in Information Technology and apply this to the development, execution and improvement of action plans by providing advice and guidance to others in the application of information and best practices  
Support and align efforts to meet customer and business needs  
Provide and support the implementation of business solutions by building relationships and partnerships with key stakeholders; identifying business needs; determining and carrying out necessary processes and practices; monitoring progress and results; recognizing and capitalizing on improvement opportunities; and adapting to competing demands, organizational changes and new responsibilities  
Collaborate closely with developers and other members of the Scrum team to implement the requirements, provide necessary guidance to testers during QA process  
Identify improvement opportunities (proactive and reactive)  
Elicit and clearly document business and systems requirements  
Assess business process and system inefficiencies  
Identify ways to increase adoption and customer satisfaction  
Ability to analyze and synthesize business requirements, including recognizing patterns and conceptualizing processes  
Participate in the Scrum rituals regularly to plan, execute, and review project deliverables and deadlines  
Develop and execute test plans  
Support system conversions, upgrades, enhancements

##### TECHNICAL EXPERIENCE:

7+years of experience performing the duties outlined above in a professional environment

##### SKILLS REQUIRED:

A minimum of 7 years of experience in business analysis or a related field.  
Exceptional analytical and conceptual thinking skills.  
Must have experience working on large scale projects as well as handling day-to-day operational requests from the business  
The ability to influence stakeholders and work closely with them to determine acceptable solutions.  
Advanced technical skills and excellent documentation skills.  
Fundamental analytical and conceptual thinking skills.  
Experience creating detailed reports and giving presentations.  
Competency in Microsoft applications including Word, Excel, and Outlook.

##### SKILLS DESIRED:

3 -5 years working in an Agile/Scrum development environment  
3-5 years' experience working with pension administration systems

## **5. Database Administrator**

### **OVERALL PURPOSE OF POSITION:**

The position is responsible for evaluating, monitoring, maintaining, performance tuning, assessing data quality, performing legacy data conversion activities, and ensuring security of CTPF production, test and development databases. This position provides leadership in design, development, and institution of quality assurance measures for production deployment of database objects and functions. In addition, this position is responsible for helping to develop, implement and oversee data policies, standards, and procedures to ensure the relational integrity and availability of the databases and their accompanying software. This position is also accountable for providing staff with access to needed data / databases.

### **ESSENTIAL DUTIES:**

Perform RDBMS recovery, restore, restart, maintenance, and rerun procedures and techniques.

Participate in assessing and developing long-term strategic goals for production databases in conjunction with user and IT management staff to ensure effective protection and integrity of data assets.

Provide support, advice, and assist programming staff on database issues and best practices.

Monitor physical data storage requirements for the databases and discuss enhancements and recommendations with Network Services staff.

Assist in troubleshooting database hardware and software problems.

Provide database performance statistics and be able to succinctly explain the importance of what statistics provide.

Develop, standardize, and perform production deployment tasks.

Advanced SQL skills necessary to assist development staff with query performance tuning.

Continually review, refine, and implement existing processes for improvement of database services and practices to development staff and end users.

Participate in load testing exercises with development staff to ensure newly developed or modified processes do not cause application or database performance degradation.

Leverage established best practices methods to ensure quality of design, implementation, and performance of data retrieval methods.

Perform other duties as required or assigned.

### **SKILLS REQUIRED:**

2+ years' professional experience

Advanced knowledge of database structure and theory

Experience with MySQL and MSSQL

Basic understanding of disaster recovery and database backup procedures

Familiarity with reporting tools

Ability to work independently with minimal supervision and assistance



## 6. Senior Database Administrator

### OVERALL PURPOSE OF POSITION:

This position is responsible for evaluating, monitoring, maintaining, performance tuning, assessing data quality, performing legacy data conversion activities, and ensuring security of CTPF production, test and development databases. In addition, this position is responsible for helping to develop, implement and oversee data policies, standards, and procedures to ensure the relational integrity and availability of the databases and their accompanying software

### ESSENTIAL DUTIES:

Perform RDBMS recovery, restore, restart, maintenance, and rerun procedures and techniques.  
Provide adequate documentation of database administration procedures including procedures for disaster recovery and data archiving to ensure effective protection and integrity of data assets.  
Develop or modify existing database schemas based on stated agency business requirements.  
Establish appropriate end-user and application database access control levels.  
Provide support, advice, and assist all IT staff on database issues and best practices.  
Monitor physical data storage requirements for the databases and discuss enhancements and recommendations with Network Services staff.  
Assist in troubleshooting database hardware and software problems.  
Provide database performance statistics and be able to succinctly explain the importance of what statistics provide.  
Assist in developing and maintaining a data dictionary for the production database tables and columns.  
Develop, standardize, and perform production deployment tasks.  
Display advanced TSQL skills necessary to assist development staff with query performance tuning.  
Participate in load testing exercises with development staff to ensure newly developed or modified processes do not cause application or database performance degradation.  
Conduct, develop, test, and implement DBA procedures and practices in conjunction with staff working in an Agile development environment.  
Become familiar with current DevOps trends supporting continuous integration development.  
Perform other duties as required or assigned

### SKILLS REQUIRED:

7 or more years of practical experience as a Database Administrator  
excellent organizational skills,  
ability to work and communicate effectively with others,  
working knowledge of client/server and multi-tiered distributed computing, database hardware, software, and various software packages pertaining to database functions  
Ability to work on installation and configuration of software in conjunction and partnership with Technical Support staff.  
A comprehensive knowledge of best practices in data design, mapping, conversion and transformation practices are a necessary requirement of this position.

## 7. Quality Assurance and Testing Analyst

### OVERALL PURPOSE OF POSITION:

Working in close co-operation with the business customers and IT teams, the quality assurance analyst applies analytical and business skills to evaluate existing and identify new or enhanced systems, products and processes which advance business objectives. The quality assurance analyst also develops, manages, and executes all phases of quality assurance testing, including analysis of product requirements to produce test requirements, and development and execution of functional/system test plans in a multi- tiered environment.

### ESSENTIAL DUTIES:

Develops and maintains a working knowledge of business processes supported by software systems/products;  
Contributes to training programs, documents, and materials;  
Conduct and participate in test case reviews, requirement reviews, design reviews, and change control activities;  
Creates and contributes to the creation of test plans, test cases, test scenarios, and test data for use during the testing phases of the software development lifecycle, for new and existing software systems/products;  
Ensures that test plans and scenarios fully exercise every aspect of the product;  
Produces formal test plans; leads the testing effort for assigned projects;  
Documents and reports issues discovered during testing, and reports issues to team leads;  
Works as part of Scrum Development Team, effectively participates in sprint planning, task estimates, task sequencing, task assignments, sprint reviews and retrospectives;  
Creates test cases and performs test case execution, and reviews. Maintains automation framework.  
Executes automated test scripts for all IT environments.  
Collaborates with other team members to understand the scope of test cases that will be used for automated scripts.  
Collaborates with end users for UAT on a specific test.  
Documents and discovers defects/issues during testing, and follows up for resolution.  
Other duties, as assigned.

### TECHNICAL EXPERIENCE:

Demonstrated experience with increasingly complex projects  
Hands-on QA testing experience in client server and/or web-based environment  
Experience with 3rd party testing and change management tools  
Experience with test case gathering techniques  
Experience with test management tools, developing test strategies and plans.  
Experience with metrics and report creation.

### DESIRED EXPERIENCE:

Experience with Software Development  
Experience with Scrum and/or other Agile Development frameworks  
Experience with Unified Functional Testing (formerly known as QTP).

## 8. Senior Quality Assurance and Testing Analyst

### OVERALL PURPOSE OF POSITION:

Working in close co-operation with the business customers and IT teams, the quality assurance analyst applies analytical and business skills to evaluate existing and identify new or enhanced systems, products and processes which advance business objectives. The quality assurance analyst also develops, manages, and executes all phases of quality assurance testing, including analysis of product requirements to produce test requirements, and development and execution of functional/system test plans in a multi- tiered environment.

### ESSENTIAL DUTIES:

Develops and maintains a working knowledge of business processes supported by software systems/products;  
Conduct and participate in test case reviews, requirement reviews, design reviews, and change control activities;  
Creates and contributes to the creation of test plans, test cases, test scenarios, and test data for use during the testing phases of the software development lifecycle, for new and existing software systems/products;  
Ensures that test plans and scenarios fully exercise every aspect of the product;  
Produces formal test plans; leads the testing effort for assigned projects;  
Documents and reports issues discovered during testing, and reports issues to Management.  
Works as part of Scrum Development Team, effectively participates in sprint planning, task estimates, task sequencing, task assignments, sprint reviews and retrospectives;  
Creates and performs complex test execution. Leads development of automation framework.  
Creates and maintains automated framework using standard coding methodologies.  
Collaborates with other team members to understand the scope of test cases that will be used for automated scripts.  
Executes automated test scripts for all IT environments.  
Leads defect tracking and resolution efforts. Leads the test management strategy.  
Anticipates and monitors risks.  
Implements quality standards, methods and procedures for quality control activities.  
Other duties, as assigned.

### TECHNICAL EXPERIENCE:

Demonstrated experience with increasingly complex projects  
Hands-on QA testing experience in client server and/or web-based environment  
Experience with 3rd party testing and change management tools  
Experience with test case gathering techniques  
Experience with test management tools, developing test strategies and plans.  
Experience with metrics and report creation.  
Experience with tools used for data validation and comparison.

### DESIRED EXPERIENCE:

Experience with Software Development  
Experience with Scrum and/or other Agile Development frameworks

## 9. Software Developer

### OVERALL PURPOSE OF POSITION:

The purpose of this position is to provide support for critical business functions through the development, implementation, testing and maintenance of applications systems.

### ESSENTIAL DUTIES:

Design, code, test, debug, maintain, and document software applications;  
Follow established software development standards and procedures;  
Support business functions through the development, implementation, and maintenance of applications systems;  
Participate in peer code reviews;  
Collaborate with departments and users in the support of business applications;  
Contribute software development expertise to ensure that specifications are met;

### TECHNICAL EXPERIENCE

.NET, Ruby on Rails, Python  
JavaScript, CSS, JQuery, React, Bootstrap  
AWS, Azure  
Application Development/Software Engineering/Design Patterns  
T-SQL/SQL Server, RDBMS concepts  
Web application development  
Object oriented design and architecture  
Technical Documentation

### DESIRED EXPERIENCE:

Experience with agile software  
Experience with Web API's  
Knowledge of application security concepts  
Experience with integration of application software  
Experience with implementation of COTS products  
Knowledge of configuration management, release management principles

## 10. Senior Software Developer

### OVERALL PURPOSE OF POSITION:

The purpose of this position is to provide support for critical business functions through the development, implementation, testing and maintenance of applications systems.

### ESSENTIAL DUTIES:

Support critical business functions through the development, implementation, and maintenance of applications and systems;  
Contribute software development expertise to multiple projects and ensure that specifications are met;  
Design, code, test, debug, maintain, and document software applications;  
Follow established software development standards and procedures and contribute towards their improvement;  
Develop complex application features and create technical designs;  
Participate in peer code and design reviews;  
Experienced with a wide range of technologies;  
Coordinate with departments and users in the support of business applications.  
Represent the IT department in terms of software development expertise in coordination with other departments;

### TECHNICAL EXPERIENCE

.NET, Ruby on Rails, Python  
JavaScript, CSS, JQuery, React, Bootstrap  
AWS, Azure  
Application Development/Software Engineering/Design Patterns  
T-SQL/SQL Server, RDBMS concepts  
Web application development  
Object oriented design and architecture  
Technical Documentation

### DESIRED EXPERIENCE:

Experience with agile software  
Experience with Web API's  
Knowledge of application security concepts  
Experience with integration of application software  
Experience with implementation of COTS products  
Knowledge of configuration management, release management principles

## 11. Technical Systems Architect

### OVERALL PURPOSE OF POSITION:

Working in close co-operation with the business customers and IT teams, the IT systems analyst applies advanced analytical and business skills to evaluate existing and identify new or enhanced systems, products and processes which advance business objectives.

### ESSENTIAL DUTIES:

Participate in the architectural strategy development and roadmap for the Gemini Pension Administration System.

Continue to refine the strategy in response to business objectives.

Participate in the architectural design oversight of all integration projects at CTPF.

Provide guidance for and collaborate with development teams actively involved in project delivery.

Develop and maintain current and planned state architectural blueprints that are used to communicate decisions, goals and strategies.

governance for architectural standards and apply influence across the software development teams to ensure alignment and application of best practices.

Working with the technical resources, evaluate existing and emerging technologies for applicability to business solutions, present business cases for evaluation, and implement prototypes or POCs to validate expected value.

Consistently demonstrate and promote company core values at all times.

Other duties as assigned

### REQUIRED EXPERIENCE:

Experience designing and implementing API/Micro Services/Web services(REST/SOAP)

Experience in integration technologies (Data Power/WMB/Mule), Messaging Tools(MQ),

Understanding of Translation Tools(WTX).

Participating in Design Reviews and Code Reviews to ensure Quality deliverables.

Experience in application configuration.

Experience in application development platforms and/or languages

(HTML/CSS/Java/.Net/PHCSC/Ruby/C).

Experience in DevOps and/or continuous deployment and/or integration process and tools (Bamboo, jenkins, RallyDev, Jira).

Experience in iterative and/or agile and/or scrum development.

Experience in solution architecture.

Application domain knowledge.

Prototyping.

Problem solving / analytical thinking.

Teamwork and collaboration.

### DESIRED EXPERIENCE:

Product-specific application architecture.

Ability to tie together solutions across systems.

## 12. Senior Technical Systems Architect

### OVERALL PURPOSE OF POSITION:

This position is responsible for ensuring alignment of project specific designs with application architecture roadmap; supporting project and/or product teams on functional and technical design activities; defining the interaction between application packages, databases, and middleware systems to optimize product functional coverage; acting as subject matter expert (SME) for products that require integration into the application.

### ESSENTIAL DUTIES:

Collaborate with rest of the delivery team members to manage scope, estimate work, build plan and schedule, track and deliver to plan

Researches, identifies, and recommends industry best practices for solving business and technology problems.

Clearly communicate and work with all Scrum teams as required to deliver effectively

Works closely with Application Development leads to socialize and facilitate buy-in on architecture approach recommendations and designs.

Understands CTPF Architecture vision/roadmap and helps guide and mentor the team to execute and deliver projects in alignment to the overall vision.

Supports team working with, contributing to, and adhering to CTPF architectural principles and industry best practices.

Create documents that specify strategy, assessment, or design in a way that delivers obvious value and is understandable by any stakeholder.

Articulate architectural differences between solution methods and the challenges and approaches to integrating solutions built on different platforms including a working knowledge of different architectural frameworks that may be used

Define the technical and solution architecture for a phased software development delivery and provide hands-on technical direction working with other developers.

Apply detailed knowledge of organizational procedures to make independent decisions and serve as a credible resource for the client's senior management team.

Assist in developing internal CTPF expertise and staff in the technical architecture being implemented

Performs other duties as assigned.

### REQUIRED EXPERIENCE:

Experience in cloud computing (SaaS / PaaS).

Experience in DevOps and/or continuous deployment and/or integration process and tools (GitHub, Jenkins, Jira, Splunk, Sonar etc).

Experience in integration technologies (Websphere Message Broker, Mule Soft).

Experience in iterative and/or agile and/or scrum development.

Experience in integration technologies (Tibco/Informatica/CAS).

Experience in solution architecture, Infrastructure, Data management

Application domain knowledge.

Problem solving / analytical thinking.

Teamwork and collaboration.

### DESIRED EXPERIENCE:

Product-specific application architecture.

Ability to tie together solutions across systems.

### 13. Technical Writer

#### OVERALL PURPOSE OF POSITION

The purpose of this position is to document internal CTPF team processes as well as other operational and support information. They will work closely with technical and operational resources to learn complex information and communicate it in a succinct, precise, and informative manner.

#### ESSENTIAL DUTIES

Researching and translating technical information into manuals and/or web-based documents for both internal non-technical and technical users  
Conducting interviews with various users, SMEs, and technical staff and quality assurance staff to gather data for documentation  
Observing production, developmental, and experimental activities to determine operating procedure and detail  
Testing the operational effectiveness of documentation and making ongoing updates as necessary  
Editing, clarifying, and proofreading documents written by others, and coaching other technical staff on ways to improve their own documentation  
Managing multiple, complex document projects and providing regular updates to project teams and the Manager of Quality Assurance  
Creating and maintaining documentation within corporate guidelines  
Performing additional tasks as assigned  
Ensuring that all written material is consistent with the organization's brand message, business objectives and stylistic standards.  
Communicating documented procedures effectively for CTPF Operational and technical users.  
Controlling and monitoring internal documentation, ensuring that high quality, professional products are created and delivered on time.  
Participate or facilitate Business Process Re-engineering activities with business partners  
Actively participating in the testing the technical processes for documentation purposes.

#### TECHNICAL EXPERIENCE:

Researching and writing system documentation	5-8 years
Microsoft Office proficiency	5-8 years
Writing technical documentation specifically for internal audiences	5-8 years
Experience developing manuals and training guides	5-8 years

#### DESIRED EXPERIENCE:

Proficiency with HTML and CSS



## 14. Business Process Engineer

### OVERALL PURPOSE OF POSITION:

To analyze business methods and find efficient alternatives. The Process Engineer will be responsible for delivering regular recommendations on how to maintain staff levels and lower costs, while meeting all of the processing standards set forth by the company and government regulations. The successful candidate will work side-by-side with the management staff to discover inefficiencies in business processes and then determine the best ways to bring our business methods in line with our strategic objectives.

### ESSENTIAL DUTIES:

Analyze work flows within and across all departments to determine how the entire company can work better together  
Create an analytical process that justifies business decisions  
Analyze capital expenditures and project designs to help find ways to cut costs  
Manage business processes, documentation and continuous improvement activities for the business  
Evaluate current processes, recommend and implement quality and efficiency improvements  
Facilitate change management and lead subject matter experts to increase customer satisfaction levels and business productivity using process improvement methodology and tools.  
Quantify, document and monitor benefits of improvement projects  
Establish control systems to maintain the gains achieved. These systems to include financial, quality and business control  
Expand and implement, analyze and report department performance KPIs and metrics  
Track, analyze and report progress to key stakeholders  
Document the department's standards, procedures and work instructions  
Facilitate the organization's continuous improvement process, monitor and control the activities across functions as defined in project and program debriefing sessions. Track and report progress

### TECHNICAL EXPERIENCE:

Demonstrated capability to analyze problems and provide accurate solutions.  
Good analytical and problem solving skills, as well as a keen attention to detail.  
Ability to manage and lead multiple projects and priorities.  
Strong data management and organization skills; proficient in Microsoft Office (MS Word, Outlook, PowerPoint, Excel).  
Ability to communicate clearly and listen attentively at all levels with internal and external parties. Must be team player, flexible and innovative.  
Excellent verbal, written, and interpersonal communication skills, with the ability to present complex topics in a concise manner.  
Ability to work in a diverse team environment including interactions with technical/administrative staff, business team leaders, and contract personnel.

### DESIRED EXPERIENCE:

5+ years in quality or business process engineering  
Excellent eye for detail  
Proven history in improving operational efficiency  
Must be comfortable integrating new technology into existing business environments

## 15. User Interface Designer

### OVERALL PURPOSE OF POSITION:

Responsible for the creation of excellent user experiences. The ideal candidate should have an eye for clean and artful design, possess superior UI skills and be able to translate high-level requirements into interaction flows and artifacts, and transform them into beautiful, intuitive, and functional user interfaces.

### ESSENTIAL DUTIES:

Collaborate with scrum teams and business users to define and implement innovative solutions for the product direction, visuals and experience  
Execute all visual design stages from concept to final hand-off to application development  
Conceptualize original ideas that bring simplicity and user friendliness to complex design roadblocks  
Create wireframes, storyboards, user flows, process flows and site maps to effectively communicate interaction and design ideas  
Present and defend designs and key milestone deliverables to peers and executive level stakeholders  
Conduct user research and evaluate user feedback  
Establish and promote design guidelines, best practices and standards

### TECHNICAL EXPERIENCE:

Proven UI experience  
Demonstrable UI design skills with a strong portfolio  
Solid experience in creating wireframes, storyboards, user flows, process flows and site maps  
Proficiency in Photoshop, Illustrator, OmniGraffle, or other visual design and wire-framing tools  
Proficiency in HTML, CSS, and JavaScript for rapid prototyping.  
Excellent visual design skills with sensitivity to user-system interaction  
Ability to present your designs and sell your solutions to various stakeholders.  
Ability to solve problems creatively and effectively  
Up-to-date with the latest UI trends, techniques, and technologies  
BS/MS in Human-Computer Interaction, Interaction Design, or related  
Experience working in an Agile/Scrum development process

### DESIRED EXPERIENCE:

Experience with Software Development  
Experience with Scrum and/or other Agile Development frameworks

## 16. Change Management Analyst

### OVERALL PURPOSE OF POSITION:

A change manager will play a key role in ensuring projects (change initiatives) meet objectives on time and on budget by increasing employee adoption and usage. This person will focus on the people side of change, including changes to business processes, systems and technology, job roles and organization structures. The primary responsibility will be creating and implementing change management strategies and plans that maximize employee adoption and usage and minimize resistance. The change manager will work to drive faster adoption, higher ultimate utilization of and proficiency with the changes that impact employees. These improvements will increase benefit realization, value creation, ROI and the achievement of results and outcomes.

### ESSENTIAL DUTIES:

- Apply a structured methodology and lead change management activities
- Apply a change management process and tools to create a strategy to support adoption of the changes required by a project or initiative.
- Support communication efforts
- Support the design, development, delivery and management of communications.
- Assess the change impact
- Conduct impact analyses, assess change readiness and identify key stakeholders.
- Support training efforts
- Provide input, document requirements and support the design and delivery of training programs.
- Complete change management assessments
- Identify, analyze and prepare risk mitigation tactics
- Identify and manage anticipated resistance
- Consult and coach project teams
- Create actionable deliverables for the five change management levers: communications plan, sponsor roadmap, coaching plan, training plan, resistance management plan
- Support and engage senior leaders
- Coach managers and supervisors
- Support organizational design and definition of roles and responsibilities
- Coordinate efforts with other specialists
- Evaluate and ensure user readiness
- Define and measure success metrics and monitor change progress
- Support change management at the organizational level

### TECHNICAL EXPERIENCE:

- A solid understanding of how people go through a change and the change process
- Experience and knowledge of change management principles, methodologies and tools
- Exceptional communication skills, both written and verbal
- Ability to establish and maintain strong relationships
- Ability to influence others and move toward a common vision or goal
- Flexible and adaptable; able to work in ambiguous situations
- Able to work effectively at all levels in an organization
- Must be a team player and able to work collaboratively with and through others
- Acute business acumen and understanding of organizational issues and challenges
- Familiarity with project management approaches, tools and phases of the project lifecycle
- Experience with large-scale organizational change efforts

## **17. Data Analyst**

### **OVERALL PURPOSE OF POSITION:**

This position is responsible for assisting with the monitoring of the quality of the data stored in CTPF databases, providing appropriate reports to users and management, and aiding with all data cleansing activities. The position will support the application development staff by providing technical assistance in effective and efficient data utilization techniques. This position will also be charged with researching and interpreting technical documentation, suggesting recommendations that support organizational needs and communicating complex information at a high level. The candidate must possess good organizational skills, the ability to work and communicate effectively with others, and have a thorough knowledge of servers / operating systems, database hardware /software and various packages.

### **ESSENTIAL DUTIES:**

Ensure the stability and reliability of data quality via ongoing data review and analysis.

Interpreting data, analyzing results using statistical techniques and providing ongoing reports

Provide guidance and training to the programming staff for effective and efficient use of database tools and resources.

Monitor database system details within the database, including stored procedures and execution times, and suggest efficiency improvements.

Analyze SQL coding techniques, developer feedback, and performance issues, and suggest recommendations

Interface with business users to research and correct data inaccuracies

Assist the CTPF Manager and/or Senior Data Analyst in developing goals for production databases in conjunction with user and IT management staff to ensure effective protection and integrity of data assets.

Assist with the resolution of technical programming and system software issues with outside vendors.

Perform test deployment tasks.

Assist with database monitoring and maintenance procedures

Assist with the maintenance of a data archival system.

Perform other duties as required or assigned.

### **SKILLS REQUIRED:**

2+ years' professional experience

Advanced knowledge of database structure and theory

Experience with MySQL and MSSQL

Basic understanding of disaster recovery and database backup procedures

Familiarity with reporting tools

Ability to work independently with minimal supervision and assistance

## **18 Senior Data Analyst**

### **OVERALL PURPOSE OF POSITION:**

This position is responsible for evaluating and reviewing database information to ensure high levels of data quality, analyzing, and producing required queries/reports in response to business user needs, and interfacing with business users to research and correct data inaccuracies. This position is accountable for maintaining an effective working relationship, and open communication with the CTPF Manager, other members of the CTPF team, and the CTPF user community as a whole.

### **ESSENTIAL DUTIES:**

- Ensure the stability and reliability of data quality via ongoing data review and analysis.
- Interpreting data, analyzing results using statistical techniques and providing ongoing reports
- Conduct detailed data analysis on data used across business units to evaluate business processes and improve on/create new features
- Respond to data and product related inquiries in real-time to support business and technical teams
- Analyze SQL coding techniques, developer feedback, and performance issues, and suggest recommendations
- Interface with business users to research and correct data inaccuracies
- Provide high level advanced triage support to stakeholders, business partners, and product teams to manage specific data/issue resolution activities
- Assist with the resolution of technical programming and system software issues with outside vendors.
- Perform Extract, Transform, and Load (ETL) activities
- Assist with database monitoring and maintenance procedures
- Provide leadership to junior analysts and collaborate with the manager and teams on approaches or solutions to business/data problems
- Perform other duties as required or assigned.

### **SKILLS REQUIRED:**

- 7 or more years of practical experience as a Data Analyst
- excellent organizational skills,
- ability to work and communicate effectively with others,
- Understanding of Scripting - experience in (Python, Perl, JavaScript, Shell),
- Practical knowledge of data in various forms (data warehouses/SQL, unstructured data environments),
- Familiarity with BI reporting tools e.g., Power BI, Tableau or Business Objects),
- Demonstrated knowledge of data governance, data quality management concepts and data quality tools (i.e. Informatica DQ)
- Understanding of Agile development methodologies, software design patterns, network design and architecture
- Comprehensive knowledge of best practices in data mapping, conversion, and transformation practices are a necessary requirement of this position.

## **19. Technical Trainer**

### **OVERALL PURPOSE OF POSITION:**

This position is responsible to educate people in a technological field. This position will develop technical training programs and help others develop skills that will make them better professionals and more capable at completing their required duties at CTPF.

The Technical Trainers must be extremely knowledgeable in their field of expertise and possess solid technical aptitude. Additionally, they must be an excellent communicator, able to explain complex subjects in a clear and interesting way.

The goal of this position is to contribute to the development of people's technical/IT skills to meet organizational needs.

### **ESSENTIAL DUTIES:**

- Devise technical training programs according to organizational requirements
- Produce training schedules and classroom agenda
- Determine course content according to objectives
- Prepare training material (presentations, worksheets etc.)
- Execute training sessions, webinars, workshops etc. in groups or individually
- Arrange for and conduct on-site training when needed
- Keep and report data on completed courses, absences, issues etc.
- Observe and evaluate results of training programs
- Determine overall effectiveness of programs and make improvements
- Perform other duties as required or assigned.

### **SKILLS REQUIRED:**

- Proven experience as technical trainer
- Knowledge of modern training techniques and tools in technical subjects
- Experience in designing technical course content
- Ability to address training needs with complete courses
- Working knowledge in MS Office (especially Powerpoint)
- Outstanding communication skills and comfortable speaking to crowds
- Excellent organizational and time-management abilities
- Degree in a relevant technical field
- Certification such as CTT+ (Certified Technical Trainer) is a strong asset

## APPENDIX F

### General Conditions

1. **Qualified Personnel.** Each Contract awarded pursuant to this RFP is for Staff Augmentation Services. Contractor must be capable of providing experienced and qualified temporary personnel to perform specified SOW-TPR activities in accordance with timing requirements set forth in the SOW-TPRs. The scope of each Contract includes staffing for the labor categories stated in Section II.1.2.

Contractor personnel knowledge, as determined by CTPF, must be sufficient so that training will not be needed to perform the services set forth in a SOW-TPR. CTPF reserves the right to reject any proposed personnel who, in the sole discretion of the CTPF, do not possess sufficient knowledge or qualifications.

The Contractor shall not knowingly offer a candidate who is unfit and/or unskilled for the work to be performed. CTPF reserves the right to immediately cancel the Contract or, at its option, terminate all or part of a SOW-TPR, if the successful Contractor offers an unqualified candidate or it is determined that the candidate is not performing as expected.

2. **Full Time Commitment.** Contractor personnel assigned to a SOW-TPR will be monitored by CTPF personnel regarding completion of the SOW-TPR. Contractor personnel assigned to a SOW-TPR must be available for full-time commitment to CTPF during the term of the SOW-TPR.

3. **Schedule.** Unless otherwise specified in a SOW-TPR, Contractor personnel assigned to a SOW-TPR shall maintain a daily and weekly work schedule consistent with CTPF normal business hours and work practices. Work schedules for Contractor personnel must be approved by the CTPF Manager responsible for that SOW-TPR. Contractor personnel are expected to comply with all CTPF rules and operating policies pertaining to conduct in the workplace. Overtime must be pre-approved on a case-by-case basis.

4. **Practices.** Work performed under a SOW-TPR must be conducted according to the practices delineated in the SOW-TPR.

5. **Additional Personnel Qualifications.** All personnel assigned to SOW-TPRs shall, in addition to meeting the position-specific qualifications, have good technical writing ability, interpersonal skills, communication skills, and conduct themselves in a professional manner.

6. **Replacement of Contractor Personnel.**

a. If, in the sole discretion of CTPF, it is determined that Contractor personnel is not satisfactorily performing the requirements or objectives of a SOW-TPR, the Contractor shall immediately remove such personnel upon notice from CTPF.

b. The Contractor shall provide CTPF with as much notice as practicable if a candidate identified in a SOW-TPR to perform services and complete deliverables will become unavailable for any reason before completion of such SOW-TPR.

c. Upon notice from CTPF that Contractor personnel is not satisfactorily performing or notice from the Contractor that personnel has become unavailable, for any reason, during the term of a SOW-TPR, the Contractor will be granted 10 working days to propose replacement personnel having qualifications equal to or better than those of the personnel being replaced. The bill rate must be the same or lower than the previous

personnel. Once a replacement is identified, CTPF may request information from the Contractor concerning the replacement personnel's qualifications and skills, to determine whether he/she is qualified to satisfactorily perform the necessary work and complete the relevant SOW-TPR objectives.

d. After Contractor personnel is accepted by CTPF, the Contractor shall provide replacement personnel, at no charge to CTPF, for as many hours as is required, as solely determined by CTPF, to complete orientation and attain the level of project proficiency of the personnel that he/she replaced. Orienting is defined as the personnel becoming acquainted with CTPF, project environment, etc. The time for getting a replacement personnel oriented may vary depending on the SOW-TPR and/or personnel.

e. If the successful proposer is unable to propose qualified replacement personnel within the 10 day time frame set forth in section II.H.6.c., or if successful proposer cumulatively offers two replacement personnel who, at any point during the term of the Contract and in CTPF's sole discretion, subsequently fail to meet any requirements, including having sufficient knowledge to complete the SOW-TPR objectives and maintain a satisfactory performance, CTPF reserves the right to immediately cancel the Contract in whole or in part without penalty or further payment by CTPF.

7. **Background Check.** All personnel proposed by Contractor for work on any SOW-TPR must meet all the qualifications for their respective position set forth in Appendix F and must have successfully undergone a federal and state criminal background check conducted by Contractor within thirty (30) days of submission of the SOW-TPR proposal. Contractor shall make the criminal background check available to CTPF upon request.

8. **CTPF Director of Human Resources.** The Director of Human Resources will submit SOW-TPRs to the selected contractor(s) on behalf of the CTPF hiring manager. The CTPF Director of Human Resources will then coordinate the efforts between the selected Contractor(s) and the CTPF hiring managers to identify qualified candidates meeting the specifications established in the SOW-TPR.

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# Appendix G: Fee Proposal

This quote is submitted by the undersigned company (“Company”), who agrees to provide personnel for the positions and at the prices set forth below.  
 Fee proposal shall be provided into the format included below. An hourly rate cost proposal is required and must include all out-of-pocket expenses attributable to the performance of the services, e.g., all overhead and travel expense, including but not limited to lodging, transportation, meals, telephone, facsimile, Internet or other communication devices, postage, delivery, copying clerical time and overtime. CTPF will not pay or reimburse these expenses.

Item No.	Job Title	Quantity	Unit	Unit Price				
				Year 1	Year 2	Year 3	Year 4	Year 5
A	Sample Position Bid	1	Hour	80 - 95	84 - 100	88 - 105	93 - 110	97 - 115
1	Agile Project Manager	1	Hour					
2	Senior Agile Project Manager	1	Hour					
3	Business Systems Analyst	1	Hour					
4	Senior Business System Analyst	1	Hour					
5	Database Administrator	1	Hour					
6	Senior Database Administrator	1	Hour					
7	Quality Assurance and Test Analyst	1	Hour					
8	Senior Quality Assurance and Test Analyst	1	Hour					
9	Software Developer	1	Hour					
10	Senior Software Developer	1	Hour					
11	Technical Systems Architect	1	Hour					
12	Senior Technical Systems Architect	1	Hour					
13	Technical Writer	1	Hour					
14	Business Process Engineer	1	Hour					
15	User Interface Designer	1	Hour					
16	Change Management Analyst	1	Hour					
17	Data Analyst	1	Hour					
18	Sr. Data Analyst	1	Hour					
19	Technical Trainer	1	Hour					

Submitted by: \_\_\_\_\_

Company Name: \_\_\_\_\_

Authorized Representative: \_\_\_\_\_

Signature: \_\_\_\_\_

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

Title: \_\_\_\_\_

Date: \_\_\_\_\_