



**State Term Contract  
No. 80101507-21-STC-ITSA  
For  
Information Technology Staff Augmentation**

This Contract is between the State of Florida, Department of Management Services (Department), an agency of the State of Florida, and RSM US LLP (Contractor), collectively referred to herein as the "Parties".

Accordingly, the Parties agree as follows:

**I. Initial Contract Term.**

The Initial Contract Term shall be for two years. The Initial Contract Term shall begin on October 1, 2021, or on the last date the Contract is signed by all Parties, whichever is later. The Contract shall expire on October 1, 2023, unless terminated earlier in accordance with the Special Contract Conditions or Additional Special Contract Conditions.

**II. Renewal Contract Term.**

Upon mutual written agreement, the Parties may renew this Contract, in whole or in part, for a Renewal Term not to exceed the Initial Contract Term, pursuant to the incorporated Special Contract Conditions.

**III. Contract**

As used in this document, "Contract" (whether or not capitalized) shall, unless the context requires otherwise, include this document and all incorporated Exhibits, which set forth the entire understanding of the Parties and supersedes all prior agreements. All modifications to this Contract must be in writing and signed by all Parties.

All Contract Exhibits listed below are incorporated in their entirety into, and form part of, this Contract. The Contract document and Exhibits shall have priority in the following order:

- a) This Contract document
- a) Contract Exhibit A, Scope of Work
- b) Contract Exhibit B, Additional Special Contract Conditions
- c) Contract Exhibit C, Special Contract Conditions
- d) Contract Exhibit D, Contractor's submitted Executive Summary and Staff Resource Management Plan
- e) Contract Exhibit E, Awarded Job Title Pricing from Contractor's submitted Price Sheet
- f) Contract Exhibit F, Resume Self-Certification Form

- g) Contract Exhibit G, Contractor Selection Justification Form
- h) Contract Exhibit H, Contractor Performance Survey
- i) Contract Exhibit I, Preferred Pricing Affidavit
- j) Contract Exhibit J, Job Family Descriptions

**IV. Contract Management.**

**Department's Contract Manager:**

Frank Miller  
Division of State Purchasing  
Florida Department of Management Services  
4050 Esplanade Way, Suite 360  
Tallahassee, FL 32399-0950  
Telephone: (850) 488-8855  
Email: frank.miller@dms.fl.gov

**Contractor's Contract Manager:**

Jennifer Murtha  
RSM US LLP  
333 S Garland Ave Suite 1410  
Orlando, Florida 32801  
Telephone: 3217516217  
Email: jennifer.murtha@rsmus.com

This Contract is executed by the undersigned officials as duly authorized. This Contract is not valid and binding on all Parties until signed and dated by both Parties.

**RSM US LLP**

**STATE OF FLORIDA,  
DEPARTMENT OF  
MANAGEMENT SERVICES**

DocuSigned by:

*Jennifer Murtha*

EP0099C02C7E4F0...

**Jennifer Murtha**

11/17/2021 | 10:15 AM EST

**Date:**

DocuSigned by:

*Ros Ingram*

SA2F008C030240E...

**Rosalyn Ingram, Director of the  
Division of State Purchasing**

12/1/2021 | 8:08 AM EST

**Date:**



**State Term Contract  
No. 80101507-21-STC-ITSA  
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**Contract Exhibit E, Awarded Job Title Pricing from Contractor's submitted Price Sheet**

**RSM US LLP**

<b>Job Family</b>	<b>Job No.</b>	<b>Job Title</b>	<b>Scope Variant</b>	<b>Contractor's Submitted Price</b>
Applications Development	1200	Director Systems and Programming	1. Team Leader	\$138.31
			2. Manager	\$155.28
			3. Sr. Manager	\$189.37
	1210	Mgmt. Applications Development	1. Team Leader	\$129.06
			2. Manager	\$149.91
			3. Sr. Manager	\$151.81
	1220	Applications Architect	A. Entry	\$104.65
			B. Intermediate	\$112.29
			C. Advanced	\$119.16
	1230	Enterprise Application Integration (EA) Engineer	No Variance	\$128.61
	1240	Systems Analyst	A. Entry	\$67.67
			B. Intermediate	\$102.49
			C. Advanced	\$109.15
	1250	Applications Development Analyst	A. Entry	\$77.14
			B. Intermediate	\$97.59
C. Advanced			\$110.84	
Data Strategy and Management	1400	Database Manager	1. Team Leader	\$134.43
			2. Manager	\$151.08
			3. Sr. Manager	\$159.56
	1410	Data Architect	A. Entry	\$92.26
			B. Intermediate	\$124.44
			C. Advanced	\$155.20
	1420	Data Modeler	A. Entry	\$73.75
			B. Intermediate	\$99.44
			C. Advanced	\$120.41
	1430	Database Analyst	A. Entry	\$90.38
			B. Intermediate	\$106.39
			C. Advanced	\$119.70
1440	Database Administrator	A. Entry	\$82.14	
		B. Intermediate	\$114.53	
		C. Advanced	\$127.75	

Job Family	Job No.	Job Title	Scope Variant	Contractor's Submitted Price
Quality Assurance	1600	Mgmt. Quality Assurance	1. Team Leader	\$105.29
			2. Manager	\$128.26
			3. Sr. Manager	\$151.54
	1610	Quality Engineering Consultant	No Variance	\$114.58
	1620	Quality Assurance Analyst	A. Entry	\$66.29
B. Intermediate			\$79.24	
C. Advanced			\$96.50	
Technology Research	1801	Manager, Technology Research	No Variance	
	1810	Technology Research Analyst	A. Entry	
			B. Intermediate	
C. Advanced				
Client Technologies	2000	Manager, Client Technologies	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2010	Client Technologies Analyst	A. Entry	
			B. Intermediate	
			C. Advanced	
2020	Client Technologies Technician	A. Entry		
		B. Intermediate		
		C. Advanced		
Customer Support	2200	Mgmt. Customer Support	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2210	Customer Support Analyst	A. Entry	
			B. Intermediate	
			C. Advanced	
2220	Customer Support Technician	A. Entry		
		B. Intermediate		
		C. Advanced		
Network Management	2400	Director, Network Operations	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2410	Manager, Network Operations	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2420	Network Architect	A. Entry	
			B. Intermediate	
			C. Advanced	
	2430	Network Engineer	A. Entry	
			B. Intermediate	
			C. Advanced	
	2440	Network Analyst	A. Entry	
			B. Intermediate	
			C. Advanced	
2450	Network Administrator	A. Entry		
		B. Intermediate		
		C. Advanced		

Job Family	Job No.	Job Title	Scope Variant	Contractor's Submitted Price
	2460	Network Technician	A. Entry	
			B. Intermediate	
			C. Advanced	
Internet Planning, Eng. & Operations	2600	Mgmt. Internet Operations	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2610	Internet/Web Architect	A. Entry	
			B. Intermediate	
			C. Advanced	
	2620	Internet/Web Engineer	A. Entry	
			B. Intermediate	
			C. Advanced	
	2630	Web Applications Programmer	A. Entry	
			B. Intermediate	
			C. Advanced	
2640	Web Designer	A. Entry		
		B. Intermediate		
		C. Advanced		
2650	Webmaster	A. Entry		
		B. Intermediate		
		C. Advanced		
2660	Internet/Web Systems Administrator	A. Entry		
		B. Intermediate		
		C. Advanced		
2670	Web Customer Support Specialist	A. Entry		
		B. Intermediate		
		C. Advanced		
Operations	2800	Director, Data Center Operations	No Variance	
	2810	Manager, Computer Operations	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	2820	Supervisor, Computer Operations	1. Team Leader	
			2. Manager	
	2830	Computer Operator	A. Entry	
B. Intermediate				
C. Advanced				
2840	Manager, Capacity Planning	No Variance		
2850	Manager, Production Support	1. Team Leader		
		2. Manager		
2860	Production Support Analyst	A. Entry		
		B. Intermediate		
		C. Advanced		
Telecommunications	3000	Manager, Telecommunication Operations	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
3010	Telecommunication Engineer	A. Entry		
		B. Intermediate		
		C. Advanced		

Job Family	Job No.	Job Title	Scope Variant	Contractor's Submitted Price
	3020	Telecommunication Technician	A. Entry	
			B. Intermediate	
			C. Advanced	
Electronic Commerce	3200	Director, Electronic Commerce	No Variance	
	3210	Manager, Electronic Commerce	No Variance	
	3220	Electronic Commerce Analyst	A. Entry	
			B. Intermediate	
C. Advanced				
3230	EDI Specialist	A. Entry		
		B. Intermediate		
		C. Advanced		
Business Intelligence Systems Management	3400	Director, Data Warehouse	1. Team Leader	\$149.48
			2. Manager	\$180.13
			3. Sr. Manager	\$225.86
	3410	Manager, Data Warehouse	No Variance	\$165.58
	3420	Business Intelligence Analyst	No Variance	\$149.16
	3430	Data Warehouse Analyst	A. Entry	\$80.37
			B. Intermediate	\$96.09
			C. Advanced	\$117.41
	3440	Data Warehouse Administrator	No Variance	\$117.63
	3600	Manager, Decision Support	No Variance	\$139.71
	3610	Decision Support Specialist	A. Entry	\$65.63
			B. Intermediate	\$78.58
			C. Advanced	\$90.56
3620	Decision Support Administrator	A. Entry	\$82.87	
		B. Intermediate	\$100.91	
		C. Advanced	\$127.88	
3800	Manager, CRM Technology	No Variance	\$196.80	
4000	Knowledge Engineer	No Variance	\$158.02	
Enterprise Resource Planning (ERP)	4200	ERP Team Lead	No Variance	
	4210	ERP Team Member	No Variance	
	4220	ERP Configurer	No Variance	
	4230	ERP Programmer/Analyst	A. Entry	
			B. Intermediate	
			C. Advanced	
	4240	ERP Systems Support Specialist	No Variance	
	4250	ERP Systems Administrator	No Variance	
4600	Basis/Ale Technical Consultant	No Variance		
Sourcing and Vendor Relationship Management	4800	Chief Sourcing Officer	No Variance	
	4810	Manager IT Procurement	No Variance	
	4820	IT Procurement Specialist	No Variance	
	5000	Manager, Vendor Relationships	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	5010	Manager, Outsourcing Contracts	No Variance	
	5020	Contracts Manager	No Variance	
5040	Finance/Administration Specialist	A. Entry		
		B. Intermediate		
		C. Advanced		

Job Family	Job No.	Job Title	Scope Variant	Contractor's Submitted Price
	5200	Technical Advisor	No Variance	
Business Management / Administration	5400	Asset Manager	No Variance	
	5410	Asset Management Administrator	A. Entry	
			B. Intermediate	
			C. Advanced	
	5500	Director, HR/IT	No Variance	
	5600	Manager, HR/IT Staffing	No Variance	
	5610	Technical Recruiter	A. Entry	
			B. Intermediate	
			C. Advanced	
	5620	HR/IT Generalist	A. Entry	
			B. Intermediate	
			C. Advanced	
	5800	Documentation Specialist/Technical Writer	A. Entry	
			B. Intermediate	
			C. Advanced	
6000	Manager, IT Finance	No Variance		
6100	Director, IT Risk and Compliance	No Variance	\$227.22	
6200	Manager, IT Audit	No Variance	\$153.90	
6210	IT Auditor	No Variance	\$107.47	
6400	Business Management Specialist	No Variance		
Training	6600	Manager, Technical Training	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	6610	Technical Trainer	A. Entry	
			B. Intermediate	
C. Advanced				
Security Management	6800	Security Manager	1. Team Leader	\$96.94
			2. Manager	\$131.25
			3. Sr. Manager	\$159.16
	6810	Security Analyst	A. Entry	\$66.11
			B. Intermediate	\$86.33
			C. Advanced	\$110.44
	6820	Data Security Specialist	No Variance	\$102.08
	6830	Network Security Specialist	No Variance	\$132.77
6840	System Security Specialist	No Variance	\$95.41	
6850	Web Security Specialist	No Variance	\$110.55	
Business Continuity Management	7000	Manager, Business Continuity	No Variance	
	7010	Business Continuity Specialist	No Variance	
Product Development	7200	Manager, Product Development	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	7210	Product Architect	No Variance	
	7220	Product Engineer	A. Entry	
B. Intermediate				
		C. Advanced		

Job Family	Job No.	Job Title	Scope Variant	Contractor's Submitted Price
	7230	Product Developer	A. Entry	
			B. Intermediate	
			C. Advanced	
Systems Programming & Admin.	7400	Manager, Systems Software	1. Team Leader	\$128.65
			2. Manager	\$149.13
			3. Sr. Manager	\$188.14
	7410	Systems Architect	A. Entry	\$66.96
			B. Intermediate	\$99.25
			C. Advanced	\$168.61
	7420	Systems Software Programmer	A. Entry	\$78.00
			B. Intermediate	\$97.50
			C. Advanced	\$118.95
	7430	Groupware Specialist	A. Entry	\$80.38
B. Intermediate			\$102.31	
C. Advanced			\$109.82	
7440	Systems Administrator	A. Entry	\$66.95	
		B. Intermediate	\$79.10	
		C. Advanced	\$102.14	
7450	UNIX System Administrator	No Variance	\$117.50	
7460	Storage Management Specialist	No Variance		
Business Analysis and Planning	7500	Director, Enterprise Architecture	No Variance	
	7600	Manager, IT Business Planning	1. Team Leader	\$126.02
			2. Manager	\$165.47
			3. Sr. Manager	\$167.70
	7610	Enterprise Architect	No Variance	
	7620	Business Process Consultant	A. Entry	\$56.37
			B. Intermediate	\$87.54
			C. Advanced	\$114.43
	7630	IT Business Consultant	A. Entry	\$69.55
			B. Intermediate	\$96.75
C. Advanced			\$100.58	
7640	Business Analyst	A. Entry	\$54.61	
		B. Intermediate	\$84.65	
		C. Advanced	\$96.57	
7700	Director, Business Relationships	No Variance		
7800	Manager, Customer Relations	No Variance		
Release Management	8000	Configuration Management Analyst	A. Entry	
			B. Intermediate	
C. Advanced				
	8010	Release/Build Engineer	No Variance	
Program Management	8200	Director, Program Management	No Variance	\$201.25
	8210	Program Manager	1. Team Leader	\$110.83
			2. Manager	\$127.91
			3. Sr. Manager	\$153.19
	8220	Project Manager	1. Team Leader	\$109.22
2. Manager			\$122.68	
3. Sr. Manager			\$127.35	



<b>Job Family</b>	<b>Job No.</b>	<b>Job Title</b>	<b>Scope Variant</b>	<b>Contractor's Submitted Price</b>
	8230	Project Leader	A. Entry	\$68.88
			B. Intermediate	\$113.84
			C. Advanced	\$124.13
	8235	Project Management Specialist	No Variance	\$88.33
	8240	Resource Manager	No Variance	\$132.36
Customer Service Hotline	8400	Manager, Customer Service Hotline	No Variance	
	8410	Customer Service Hotline Representative	A. Entry	
			B. Intermediate	
C. Advanced				
Technical Product Support	8600	Manager, Technical Product Support	1. Team Leader	
			2. Manager	
			3. Sr. Manager	
	8610	Technical Product Support Analyst	No Variance	
	8620	Technical Product Support Specialist	A. Entry	
B. Intermediate				
C. Advanced				



## **Contract Exhibit A Scope of Work**

### **1. Purpose**

To provide Customers with a State Term Contract (STC) for information technology staff augmentation services, pursuant to the terms set forth in this Scope of Work.

### **2. Definitions**

**Business Day** – Monday through Friday, inclusive, except for those holidays specified in section 110.117, F.S., from 8:00 a.m. to 5:00 p.m., in the time zone the Customer is located.

**Ceiling Rate** – The maximum Proposed Price a Bidder may propose for an associated Job Title or Scope Variant while still being deemed to have submitted the lowest responsive bid.

**Confidential Information** – Information that is trade secret or otherwise confidential or exempt from disclosure under Florida or federal law.

**Contract** – The written agreement between the Department and the awarded Bidder(s) resulting from ITB No. 21-80101507-ITB.

**Contractor** – A Vendor that enters into a Contract with the Department as a result of ITB No. 21-80101507-ITB.

**Customer** – A State Agency or Eligible User, as defined in Rule 60A-1.001, Florida Administrative Code (F.A.C.).

**Department** – The Department of Management Services, a State Agency.

**Information Technology (IT) Experience** – Experience working in the computer science industry that involves performing IT services and utilizing equipment, hardware, software, firmware, programs, systems, networks, infrastructure, media, and related material.

**Information Technology (IT) Staff Augmentation Contract Experience** – Demonstrated prior work experience in the allocation and outsourcing of qualified information technology Staff to augment a workforce on a temporary basis.

**Job Family** – A group of related Job Titles within the Job Family Descriptions document, Contract Exhibit J.

**Job Title** – The position described within the Job Family Descriptions document, Contract Exhibit J. The Job Family Descriptions document includes each Job Title's general characteristics and dimensions.

**Operational Formula** – The day-to-day actions of a company that are guided by a policy or procedure that is prescribed for repetitive use as a practice, in accordance with agreed upon operations that are aimed at obtaining a desired outcome.

**Prequalification** – A determination by the Department that a responsible and responsive Bidder is deemed to have submitted the lowest responsive Bid and has met the minimum requirements within the solicitation (including capability, experience, and past performance) for participation

on the Contract. A Bidder who has been Prequalified is authorized to respond to Requests for Quotes from Customers in accordance with section 287.0591(6), F.S.

**Principal Personnel** – The management of the Bidder company who make operational decisions.

**Proposed Price** – The Vendor’s maximum hourly rate for an associated Job Title or Scope Variant for the initial and renewal term. A “not to exceed” price.

**Scope Variant** – A gradation of experience within a Job Title.

**Staff** – The temporary staff provided by the Contractor or Contractor’s subcontractor(s) to render information technology services identified by Customers.

**State** – The State of Florida.

### **3. Contractor’s General Responsibilities**

The Contractor, regardless of any delegation or subcontract entered by the Contractor, shall be responsible for the following when providing information technology staff augmentation services:

- 3.1 The Contractor is responsible for the comprehensive management of Staff. Staff shall not be deemed an employee of the State or deemed to be entitled to any benefits associated with such employment and the Contractor shall be responsible for the administration and maintenance of all employment and payroll records, payroll processing, remittance of payroll and taxes, and all administrative tasks required by state and federal law associated with payment of Staff.
- 3.2 The Contractor shall provide Staff in accordance with Customer Requests for Quote (RFQ), and as described in Contract Exhibit J, [Job Family Descriptions document](#). Customers may include detailed scopes of work, specific requirements of the work to be performed, and any requirements of Staff within the Request for Quote.
- 3.3 The Contractor shall possess the professional and technical staff necessary to allocate, outsource, and manage qualified Staff to perform the services requested by the Customer.
- 3.4 The Contractor shall provide Customers with Staff who have sufficient skill and experience to perform the services assigned to them.
- 3.5 The Contractor is responsible for ensuring that all information technology staff augmentation services furnished under the Contract meet the professional standards and quality that prevails among information technology professionals in the same discipline and of similar knowledge and skill engaged in related work throughout Florida under the same or similar circumstances.
- 3.6 The Contractor shall provide, at its own expense, training necessary for keeping Contractor’s Staff abreast of industry advances and for maintaining proficiency in equipment and systems that are available on the commercial market.

- 3.7 The Contractor shall, at its own expense, be responsible for adhering to the Contract background screening requirements, testing, evaluations, advertising, recruitment, and disciplinary actions of Contractor's Staff.
- 3.8 The Contractor, throughout the term of the Contract, shall maintain all licenses, permits, qualifications, insurance, and approvals of whatever nature that are legally required for Contractor and Staff to perform the information technology staff augmentation services.
- 3.9 Contractor shall be responsible for all costs associated with the administration of this Contract.
- 3.10 The Contractor shall adhere to all work policies, procedures, and standards established by the Department and Customer.
- 3.11 The Contractor shall ensure that Staff conform with the Customer's policies in all respects while on the Customer's premises, and is responsible for obtaining all rules, regulations, policies, etc.
- 3.12 Contractor shall only provide information technology staff augmentation services for those Job Titles awarded to the Contractor and shall be paid on an hourly basis. Contracts resulting from this solicitation should not be structured as fixed-price agreements or used for any services requiring authorization for payment of milestone tasks.

**4. Subcontracts and Staff**

- 4.1 The Contractor is fully responsible for satisfactory completion of all work on this Contract. The Contractor shall ensure and provide assurances to the Department or Customer upon request, that any subcontractor(s) or Staff provided under this Contract has the necessary qualifications and abilities to perform in accordance with the terms and conditions of this Contract.

The Contractor must provide the Customer with the names of Staff considered for work on a purchase order issued under this Contract. The Customer shall retain the right to reject any Staff whose qualifications or performance, in the Customer's exclusive judgment, is insufficient.

- 4.2 The Contractor agrees to be responsible for all work performed and all expenses incurred by subcontractors and Staff while performing work under this Contract.
- 4.3 Any subcontract or Staff arrangements must be evidenced by a written document available to the Department or Customer
- 4.4 The Contractor agrees to make payments to the subcontractor or Staff within seven (7) working days after receipt of full or partial payments from the Customer in accordance with Section 287.0585, F.S., unless otherwise stated in the contract between Contractor and subcontractor or required by law.
- 4.5 The Contractor agrees that neither the Department nor the Customer shall be liable to any subcontractor or Staff for any expenses or liabilities incurred in furtherance of this

Contract, and Contractor shall be solely liable to the subcontractor and Staff for all expenses and liabilities incurred under the Contractor's contract or subcontract. The Contractor, at its expense, shall defend the Customer and the Department against any subcontractor or Staff claims regarding compensation or payment.

- 4.6 Requests to utilize subcontractors to provide Staff shall be made to the Department utilizing the form located at [https://www.dms.myflorida.com/business\\_operations/state\\_purchasing/vendor\\_resources/subcontractor\\_dealer\\_reseller\\_forms](https://www.dms.myflorida.com/business_operations/state_purchasing/vendor_resources/subcontractor_dealer_reseller_forms)
- 4.7 The Department supports diversity in its procurements and contracts, and requests that Contractors who engage in subcontracting offer subcontracting opportunities to certified woman-, veteran-, and minority-owned small businesses. The Contractor may contact the Office of Supplier Diversity at [osdinfo@dms.myflorida.com](mailto:osdinfo@dms.myflorida.com) for information on certified business enterprises available for subcontracting opportunities.

### **5. Conduct of Employees and Staff**

Contractor shall ensure that all of Contractor's employees and Staff provided under the Contract shall adhere to the standards of conduct prescribed in the Customer's personnel policy and procedure guidelines, particularly rules of conduct, security procedures, and any other applicable rules, regulations, policies, and procedures of the Customer, including but not limited to Rule Chapter 33-208, Florida Administrative Code. The Contractor shall ensure that all Staff and employees wear attire suitable for the position, either a standard uniform or business casual dress, as may be identified by the Customer.

### **6. Contractor Security Clearance**

Customers may designate certain duties and/or positions as positions of "special trust" because they involve special trust responsibilities, are located in sensitive locations, or have key capabilities with access to sensitive or confidential information. The designation of a special trust position or duties is at the sole discretion of the Customer. Contractor or Contractor's employees and Staff who, in the performance of this Contract, will be assigned to work in positions determined by the Customer to be positions of special trust, may be required to submit to background screening and be approved by the Customer to work on this Contract.

### **7. Purchasing Card**

The State has implemented a purchasing card program using the Visa platform. The Contractor may receive payments via the State's Purchasing Card in the same manner as any other Visa purchases. Purchasing Card acceptance for purchase is a mandatory requirement for the Contract but is not the exclusive method of payment. If the State changes its Purchasing Card platform during the term of Contract, the Contractor shall make any necessary changes to accommodate the State's new Purchasing Card platform within 30 calendar days of notification of such change.

### **8. Purchase Order Requirements**

Customers shall use a Request for Quote per section 287.056(2), Florida Statutes, when making purchases off of this State Term Contract. Customers shall issue Request for Quotes to at least 25 vendors approved to provide IT Staff Augmentation services in accordance with section 287.0591(5), Florida Statutes. Customers shall order services from the Request for Quote via a Purchase Order with the Customers' selected Contractor. The terms of the Purchase Order shall not conflict with the terms and conditions established by this Contract.

In accepting a Purchase Order, the Contractor recognizes its responsibility for all tasks and deliverables contained therein, warrants that it has fully informed itself of all relevant factors affecting accomplishment of the tasks and deliverables and agrees to be fully accountable for the performance thereof.

## **9. Request for Quotes**

- 9.1 Customers needing information technology staff augmentation services will create a Request for Quote eQuote event in MFMP Sourcing, each time they desire to solicit information technology staff augmentation services. The Customer shall issue a detailed RFQ that includes a term, service levels, educational qualifications and experience needed.
- 9.2 The Customer shall select at least one (1) awarded Contractor for the RFQ event. MFMP Sourcing will automatically add an additional twenty-five (25) randomly selected awarded Contractors to the RFQ event. All twenty-six (26) awarded Contractors sent the RFQ will receive a notification of the RFQ and may respond. Customers may view the RFQ Contractor List on the event's "Overview" tab.
- 9.3 Pursuant to section 287.056(2), F.S., RFQs performed within the scope of this Contract are not independent competitive solicitations and are not subject to the notice or challenge provisions of section 120.57(3), F.S.
- 9.4 All Customers who utilize MFMP must use the MFMP Sourcing application for creating RFQ's on this contract. Customers who do not utilize MFMP will create a RFQ document each time they desire to solicit information technology staff augmentation services and shall send the RFQ document electronically via email to at least (25) awarded or prequalified Contractors.

## **10. Resume Self-Certification Form**

When submitting a response to an RFQ the Contractor shall submit with its response a completed and signed Resume Self-Certification Form (Contract Exhibit F) to the Customer for each proposed Staff member identified in the RFQ response.

## **11. Ongoing Performance Measures**

The Department intends to use performance-reporting tools in order to measure the performance of Contractor(s). These tools will include the Contractor Performance Survey (Exhibit H), to be completed by Customers on a quarterly basis. Such measures will allow the Department to better track Vendor performance through the term of the Contract(s) and ensure that Contractor(s) consistently provide quality services to the State and its Customers. The Department reserves the right to modify the Contractor Performance Survey document and introduce additional performance-reporting tools as they are developed, including online tools (e.g. tools within MFMP or on the Department's website).

## **12. Holidays**

The following days are observed as holidays by state agencies in accordance with section 110.117, F.S.:

- New Year's Day
- Birthday of Martin Luther King, Jr., third Monday in January
- Memorial Day

- Independence Day
- Labor Day
- Veterans' Day, November 11
- Thanksgiving Day
- Friday after Thanksgiving
- Christmas Day

If any of these holidays falls on Saturday, the preceding Friday shall be observed as a holiday. If any of these holidays falls on Sunday, the following Monday shall be observed as a holiday. Customers may have additional holiday(s) observed specifically by the Customer which will be detailed in the Customer's order.

### 13. Contract Reporting

The Contractor shall report information on orders received from Customers associated with this Contract. No price adjustments will be considered for any Contractor who has outstanding reports, or any other documentation required under this Contract. The Contractor shall submit reports in accordance with the following schedule:

Report	Period Covered	Due Date
MFMP Transaction Fee Report	Calendar month	15 calendar days after the end of each month
Quarterly Sales Report	State's Fiscal Quarter	30 calendar days after close of the period
Diversity Report (submitted to the Customer)	State Fiscal Year	30 Business Days after close of the period
Preferred Pricing Affidavit (in accordance with the Special Contract Conditions)	Annual	Contract Anniversary Date

### 14. MFMP Transaction Fee Report

The Contractor is required to submit monthly MFMP Transaction Fee Reports in the Department's electronic format. Reports are due 15 calendar days after the end of the reporting period. For information on how to submit Transaction Fee Reports online, please reference the detailed fee reporting instructions and vendor training presentations available online at the "Transaction Fee & Reporting" section and "Training for Vendors" subsections under the "Vendors" tab on the MFMP website. Assistance with Transaction Fee Reporting is also available from the MFMP Customer Service Desk by email at: [VendorHelp@myfloridamarketplace.com](mailto:VendorHelp@myfloridamarketplace.com) or telephone 866-FLA-EPRO (866-352-3776) from 8:00 a.m. to 6:00 p.m. Eastern Time.

### 15. Quarterly Sales Reports

The Contractor shall submit a completed Quarterly Sales Report electronically, in the required format, to the Department's Contract Manager within thirty (30) calendar days after close of each quarter. The quarterly sales report can be found here:



[https://www.dms.myflorida.com/business\\_operations/state\\_purchasing/vendor\\_resources/quarterly\\_sales\\_report\\_format](https://www.dms.myflorida.com/business_operations/state_purchasing/vendor_resources/quarterly_sales_report_format).

The Contract Quarterly Sales Report will include all sales and orders associated with this Contract from Customers received during the reporting period. Initiation and submission of the Sales Report is the responsibility of the Contractor without prompting or notification from the DMS Contract Manager.

Failure to provide the quarterly sales report will result in the imposition of financial consequences and may result in the Contractor being found in default and the termination of the Contract. Initiation and submission of the quarterly sales report are the responsibility of the Contractor without prompting or notification by the Department. Sales will be reviewed on a quarterly basis. If no sales are recorded during the period, the Contractor must submit a report stating that there was no activity. If no sales are recorded in two consecutive quarters, the Contractor may be placed in probationary status or the Department may terminate the Contract.

Quarter 1 – (July-September) – due 30 calendar days after the close of the period  
Quarter 2 – (October-December) – due 30 calendar days after the close of the period  
Quarter 3 – (January-March) – due 30 calendar days after the close of the period  
Quarter 4 – (April-June) due 30 calendar days after the close of the period

Exceptions may be made if a delay in submitting reports is attributable to circumstances that are clearly beyond the control of the Contractor. The burden of proof of unavoidable delay shall rest with the Contractor and shall be supplied in a written form and submitted to the Department.

The Department reserves the right to request additional sales information as needed.

## **16. Diversity Report**

The Contractor shall report to each Customer, spend with certified and other minority business enterprises. These reports shall include the period covered, the name, minority code and Federal Employer Identification Number of each minority business utilized during the period, Commodities provided by the minority business enterprise, and the amount paid to each minority business on behalf of each purchasing agency ordering under the terms of this Contract.

## **17. Ad Hoc Reports**

The Department or Customer may require additional Contract information such as copies of purchase orders or ad hoc sales reports. The Contractor shall submit information in response to these specific ad hoc requests for reports within the specified amount of time as requested by the Department or Customer.

## **18. Business Review Meetings**

In order to maintain the relationship between the Department and the Contractor, each quarter the Department may request a business review meeting. The business review meeting may include, but is not limited to, the following:

- Successful completion of deliverables
- Review of the Contractor's performance
- Review of minimum required reports
- Addressing of any elevated Customer issues

- Review of continuous improvement ideas that may help lower total costs and improve business efficiencies.

### 19. Financial Consequences

Financial Consequences will be assessed for failure to timely perform or submit a report as required by the Contract and shall be paid via check or money order in US Dollars and made out to the Department of Management Services or the specific Customer, where applicable. Financial Consequences will be assessed daily for each individual failure until the performance or submittal is accomplished to the Department's or Customer's satisfaction, unless stated otherwise. For the submissions of reports, financial consequences will apply to each target period beginning with the first full month or quarter of the Contract's performance and each month and quarter thereafter.

Deliverable	Performance Metric	Performance Due Date	Financial Consequence for Non-Performance
Contractor will timely submit completed Quarterly Sales Reports	All Quarterly Sales Reports will be submitted timely with the required information	Reports are due on or before the 30 <sup>th</sup> calendar day after the close of each State fiscal quarter	\$250 per Calendar Day late/not received by the Contract Manager
Contractor will timely submit completed MFMP Transaction Fee Reports	All MFMP Transaction Fee Reports will be submitted timely with the required information	Reports are due on or before the 15 <sup>th</sup> calendar day after the close of each month	\$100 per Calendar Day late/not received by the Contract Manager

### 20. Routine Communications

All routine communications related to the Contract shall be sent to the Department's Contract Manager. If any of the Contractor's contract information changes during the life of the Contract, the Contractor shall notify the Department's Contract Manager; such updates do not necessitate a formal amendment to the Contract. Communications relating to a Customer contract or purchase order should be addressed to the contact person identified in the contract or purchase order. Routine communications may be my email, regular mail, or telephone.

### 21. Contract Transition

Upon Contract expiration or termination, the Contractor shall ensure a seamless transfer of Contract responsibilities with any subsequent Contractor necessary to transition the Products and services of the Contract. The incumbent Contractor assumes all expenses related to the contract transition.

### 22. Other Fees and Charges

Additional fees (including but not limited to, property taxes, fuel surcharges, interest fees, license fees, and late payment fees except where permitted by section 215.422(3)(b), F.S.) or fees not permitted elsewhere in the Contract are prohibited.



**Contract Exhibit B  
ADDITIONAL SPECIAL CONTRACT CONDITIONS**

**The sections of the Special Contract Conditions referenced below are replaced in their entirety or added as follows:**

**2.2 Renewal.**

Upon written agreement, the Department and Contractor may renew the Contract in whole or in part only as set forth in the Contract documents, and in accordance with section 287.057(14), F.S.

**5.1 Conduct of Business.**

The Contractor must comply with all laws, rules, codes, ordinances, and licensing requirements that are applicable to the conduct of its business, including those of federal, state, and local agencies having jurisdiction and authority. For example, the Contractor must comply with section 274A of the Immigration and Nationality Act, the Americans with Disabilities Act, Health Insurance Portability and Accountability Act, if applicable, and all prohibitions against discrimination on the basis of race, religion, sex, creed, national origin, handicap, marital status, or veteran's status. The provisions of subparagraphs 287.058(1)(a)-(c) and (g), F.S., are hereby incorporated by reference.

Nothing contained within this Contract shall be construed to prohibit the Contractor from disclosing information relevant to performance of the Contract or purchase order to members or staff of the Florida Senate or Florida House of Representatives.

Pursuant to section 287.057(26), F.S., the Contractor shall ensure a representative will be available to team members of the continuing oversight team.

**5.4 Convicted, Discriminatory, Antitrust Violator, and Suspended Vendor Lists.**

In accordance with sections 287.133, 287.134, and 287.137, F.S., the Contractor is hereby informed of the provisions of sections 287.133(2)(a), 287.134(2)(a), and 287.137(2)(a), F.S. For purposes of this Contract, a person or affiliate who is on the Convicted Vendor List, the Discriminatory Vendor List, or the Antitrust Violator Vendor List may not perform work as a contractor, supplier, subcontractor, or consultant under the Contract. The Contractor must notify the Department if it or any of its suppliers, subcontractors, or consultants have been placed on the Convicted Vendor List, the Discriminatory Vendor List, or the Antitrust Violator Vendor List during the term of the Contract.

In accordance with section 287.1351, F.S., a vendor placed on the Suspended Vendor List may not enter into or renew a contract to provide any goods or services to an agency after its placement on the Suspended Vendor List.

A firm or individual placed on the Suspended Vendor List pursuant to section 287.1351, F.S., the Convicted Vendor List pursuant to section 287.133, F.S., the Antitrust Violator Vendor List pursuant to section 287.137, F.S., or the Discriminatory Vendor List pursuant to section 287.134, F.S., is immediately disqualified from Contract eligibility.

#### 5.6 Cooperation with Inspector General and Records Retention.

Pursuant to section 20.055(5), F.S., the Contractor understands and will comply with its duty to cooperate with the Inspector General in any investigation, audit, inspection, review, or hearing. Upon request of the Inspector General or any other authorized State official, the Contractor must provide any information the Inspector General deems relevant. Such information may include, but will not be limited to, the Contractor's business or financial records, documents, or files of any type or form that refer to or relate to the Contract. The Contractor will retain such records for the longer of five years after the expiration or termination of the Contract, or the period required by the General Records Schedules maintained by the Florida Department of State, at the Department of State's Records Management website. The Contractor agrees to reimburse the State of Florida for the reasonable costs of investigation incurred by the Inspector General or other authorized State of Florida official for investigations of the Contractor's compliance with the terms of this or any other agreement between the Contractor and the State of Florida which results in the suspension or debarment of the Contractor. Such costs will include but will not be limited to: salaries of investigators, including overtime; travel and lodging expenses; and expert witness and documentary fees. The Contractor agrees to impose the same obligations to cooperate with the Inspector General and retain records on any subcontractors used to provide goods or services under the Contract.

#### 8.1.1 Termination of Contract.

The Department may terminate the Contract for refusal by the Contractor to comply with this section by not allowing access to all public records, as defined in Chapter 119, F. S., made or received by the Contractor in conjunction with the Contract unless the records are exempt from s. 24(a) of Art. I of the State Constitution and section 119.071(1), F.S.

#### 8.1.2 Statutory Notice.

Pursuant to section 119.0701(2)(a), F.S., for contracts for services with a contractor acting on behalf of a public agency, as defined in section 119.011(2), F.S., the following applies:

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE DEPARTMENT'S CONTRACT MANAGER LISTED IN SECTION 4.3 OF THE SPECIAL CONTRACT CONDITIONS.**

Pursuant to section 119.0701(2)(b), F.S., for contracts for services with a contractor acting on behalf of a public agency as defined in section 119.011(2), F.S., the Contractor shall:

- (a) Keep and maintain public records required by the public agency to perform the service.
- (b) Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a

reasonable time at a cost that does not exceed the cost provided in Chapter 119, F.S., or as otherwise provided by law.

(c) Ensure that public records that are exempt or confidential and exempt from public records disclosure are not disclosed except as authorized by law for the duration of the Contract term and following the completion of the Contract if the Contractor does not transfer the records to the public agency.

(d) Upon completion of the Contract, transfer, at no cost, to the public agency all public records in possession of the Contractor or keep and maintain public records required by the public agency to perform the service. If the Contractor transfers all public records to the public agency upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

#### 12.1 Performance or Compliance Audits.

The Department may conduct or have conducted performance and/or compliance audits of the Contractor and subcontractors as determined by the Department. The Department may conduct an audit and review all the Contractor's and subcontractors' data and records that directly relate to the Contract. To the extent necessary to verify the Contractor's fees and claims for payment under the Contract, the Contractor's agreements or contracts with subcontractors, partners, or agents of the Contractor, pertaining to the Contract, may be inspected by the Department upon fifteen (15) calendar days' notice, during normal working hours and in accordance with the Contractor's facility access procedures where facility access is required. Release statements from its subcontractors, partners, or agents are not required for the Department or its designee to conduct compliance and performance audits on any of the Contractor's contracts relating to this Contract. The Inspector General, in accordance with section 5.6, the State of Florida's Chief Financial Officer, and the Office of the Auditor General shall also have authority to perform audits and inspections.

#### 12.3 Document Inspection.

In accordance with section 216.1366, F.S., the Department is authorized to inspect the: (a) financial records, papers, and documents of the Contractor that are directly related to the performance of the Contract or the expenditure of state funds; and (b) programmatic records, papers, and documents of the Contractor which the Department determines are necessary to monitor the performance of the Contract or to ensure that the terms of the Contract are being met. The Contractor shall provide such records, papers, and documents requested by the Department within 10 Business Days after the request is made.

#### 13.2 E-Verify.

The Contractor and its subcontractors have an obligation to utilize the U.S. Department of Homeland Security's (DHS) E-Verify system for all newly hired employees in accordance with section 448.095, F.S. By executing this Contract, the Contractor certifies that it is registered with, and uses, the E-Verify system for all newly hired employees in accordance with section 448.095, F.S. The Contractor must obtain an affidavit from its subcontractors in accordance with paragraph (2)(b) of section 448.095, F.S., and maintain a copy of such affidavit for the duration of the Contract. The Contractor shall provide a copy of its DHS Memorandum of Understanding (MOU) to the Department's Contract Manager within five days of Contract execution.

This section serves as notice to the Contractor regarding the requirements of section 448.095, F.S., specifically sub-paragraph (2)(c)1, and the Department's obligation to terminate the Contract if it has a good faith belief that the Contractor has knowingly violated section 448.09(1), F.S. If terminated for such reason, the Contractor will not be eligible for award of a public contract for at least one year after the date of such termination. The Department will promptly notify the Contractor and order the immediate termination of the contract between the Contractor and a subcontractor performing work on its behalf for this Contract should the Department have a good faith belief that the subcontractor has knowingly violated section 448.09(1), F.S.

**Contract Exhibit C**  
**SPECIAL CONTRACT CONDITIONS**  
**JULY 1, 2019 VERSION**

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**In accordance with Rule 60A-1.002(7), F.A.C., Form PUR 1000 is included herein by reference but is superseded in its entirety by these Special Contract Conditions.**

## **SECTION 1. DEFINITION.**

The following definition applies in addition to the definitions in Chapter 287, Florida Statutes (F.S.), and Rule Chapter 60A-1, Florida Administrative Code (F.A.C.):

### **1.1 Customer.**

The agency or eligible user that purchases commodities or contractual services pursuant to the Contract.

## **SECTION 2. CONTRACT TERM AND TERMINATION.**

### **2.1 Initial Term.**

The initial term will begin on the date set forth in the Contract documents or on the date the Contract is signed by all Parties, whichever is later.

### **2.2 Renewal.**

Upon written agreement, the Department and the Contractor may renew the Contract in whole or in part only as set forth in the Contract documents, and in accordance with section 287.057(13), F.S.

### **2.3 Suspension of Work and Termination.**

#### **2.3.1 Suspension of Work.**

The Department may, at its sole discretion, suspend any or all activities under the Contract, at any time, when it is in the best interest of the State of Florida to do so. The Customer may suspend a resulting contract or purchase order, at any time, when in the best interest of the Customer to do so. The Department or Customer will provide the Contractor written notice outlining the particulars of the suspension. After receiving a suspension notice, the Contractor must comply with the notice and will cease the performance of the Contract or purchase order. Suspension of work will not entitle the Contractor to any additional compensation. The Contractor will not resume performance of the Contract or purchase order until so authorized by the Department.

#### **2.3.2 Termination for Convenience.**

The Contract may be terminated by the Department in whole or in part at any time, in the best interest of the State of Florida. If the Contract is terminated before performance is completed, the Contractor will be paid only for that work satisfactorily performed for which costs can be substantiated. Such payment, however, may not exceed an amount which is the same percentage of the Contract price as the amount of work satisfactorily performed. All work in progress will become the property of the Customer and will be turned over promptly by the Contractor.

#### **2.3.3 Termination for Cause.**

If the performance of the Contractor is not in compliance with the Contract requirements or the Contractor has defaulted, the Department may:

- (a) immediately terminate the Contract;
- (b) notify the Contractor of the noncompliance or default, require correction, and specify the date by which the correction must be completed before the Contract is terminated; or
- (c) take other action deemed appropriate by the Department.



### **SECTION 3. PAYMENT AND FEES.**

#### **3.1 Pricing.**

The Contractor will not exceed the pricing set forth in the Contract documents.

#### **3.2 Price Decreases.**

The following price decrease terms will apply to the Contract:

**3.2.1 Quantity Discounts.** Contractor may offer additional discounts for one-time delivery of large single orders;

**3.2.2 Preferred Pricing.** The Contractor guarantees that the pricing indicated in this Contract is a maximum price. Additionally, Contractor's pricing will not exceed the pricing offered under comparable contracts. Comparable contracts are those that are similar in size, scope, and terms. In compliance with section 216.0113, F.S., Contractor must annually submit an affidavit from the Contractor's authorized representative attesting that the Contract complies with this clause.

**3.2.3 Sales Promotions.** In addition to decreasing prices for the balance of the Contract term due to a change in market conditions, the Contractor may conduct sales promotions involving price reductions for a specified lesser period. The Contractor must submit documentation identifying the proposed: (1) starting and ending dates of the promotion, (2) commodities or contractual services involved, and (3) promotional prices compared to then-authorized prices.

#### **3.3 Payment Invoicing.**

The Contractor will be paid upon submission of invoices to the Customer after delivery and acceptance of commodities or contractual services is confirmed by the Customer. Invoices must contain sufficient detail for an audit and contain the Contract Number and the Contractor's Federal Employer Identification Number.

#### **3.4 Purchase Order.**

A Customer may use purchase orders to buy commodities or contractual services pursuant to the Contract and, if applicable, the Contractor must provide commodities or contractual services pursuant to purchase orders. Purchase orders issued pursuant to the Contract must be received by the Contractor no later than the close of business on the last day of the Contract's term. The Contractor is required to accept timely purchase orders specifying delivery schedules that extend beyond the Contract term even when such extended delivery will occur after expiration of the Contract. Purchase orders shall be valid through their specified term and performance by the Contractor, and all terms and conditions of the Contract shall survive the termination or expiration of the Contract and apply to the Contractor's performance. The duration of purchase orders for recurring deliverables shall not exceed the expiration of the Contract by more than twelve months. Any purchase order terms and conditions conflicting with these Special Contract Conditions shall not become a part of the Contract.

#### **3.5 Travel.**

Travel expenses are not reimbursable unless specifically authorized by the Customer in writing and may be reimbursed only in accordance with section 112.061, F.S.

### 3.6 Annual Appropriation.

Pursuant to section 287.0582, F.S., if the Contract binds the State of Florida or an agency for the purchase of services or tangible personal property for a period in excess of one fiscal year, the State of Florida's performance and obligation to pay under the Contract is contingent upon an annual appropriation by the Legislature.

### 3.7 Transaction Fees.

The State of Florida, through the Department of Management Services, has instituted MyFloridaMarketPlace, a statewide eProcurement system pursuant to section 287.057(22), F.S. All payments issued by Customers to registered Vendors for purchases of commodities or contractual services will be assessed Transaction Fees as prescribed by rule 60A-1.031, F.A.C., or as may otherwise be established by law. Vendors must pay the Transaction Fees and agree to automatic deduction of the Transaction Fees when automatic deduction becomes available. Vendors will submit any monthly reports required pursuant to the rule. All such reports and payments will be subject to audit. Failure to comply with the payment of the Transaction Fees or reporting of transactions will constitute grounds for declaring the Vendor in default and subject the Vendor to exclusion from business with the State of Florida.

### 3.8 Taxes.

Taxes, customs, and tariffs on commodities or contractual services purchased under the Contract will not be assessed against the Customer or Department unless authorized by Florida law.

### 3.9 Return of Funds.

Contractor will return any overpayments due to unearned funds or funds disallowed pursuant to the terms of the Contract that were disbursed to the Contractor. The Contractor must return any overpayment within forty (40) calendar days after either discovery by the Contractor, its independent auditor, or notification by the Department or Customer of the overpayment.

## **SECTION 4. CONTRACT MANAGEMENT.**

### 4.1 Composition and Priority.

The Contractor agrees to provide commodities or contractual services to the Customer as specified in the Contract. Additionally, the terms of the Contract supersede the terms of all prior agreements between the Parties on this subject matter.

### 4.2 Notices.

All notices required under the Contract must be delivered to the designated Contract Manager in a manner identified by the Department.

### 4.3 Department's Contract Manager.

The Department's Contract Manager, who is primarily responsible for the Department's oversight of the Contract, will be identified in a separate writing to the Contractor upon Contract signing in the following format:

Department's Contract Manager Name

Department's Name  
Department's Physical Address  
Department's Telephone #  
Department's Email Address

If the Department changes the Contract Manager, the Department will notify the Contractor. Such a change does not require an amendment to the Contract.

4.4 Contractor's Contract Manager.

The Contractor's Contract Manager, who is primarily responsible for the Contractor's overall performance, will be identified in a separate writing to the Department for contract signing in the following format:

Contractor's Contract Manager Name  
333 S Garland Ave Suite 1410  
Contractor's Name  
333 S Garland Ave Suite 1410  
Contractor's Physical Address  
Orlando, Florida 32801  
Contractor's Telephone #  
Orlando, Florida 32801  
Contractor's Email Address  
3217516217

333 S Garland Ave Suite 1410  
If the Contractor changes its Contract Manager, the Contractor will notify the Department. Such a change does not require an amendment to the Contract.  
jennifer.murtha@rsmus.com  
Orlando, Florida 32801  
jennifer.murtha@rsmus.com

4.5 Diversity. 3217516217

4.5.1 Office of Supplier Diversity.

The State of Florida supports its diverse business community by creating opportunities for woman-, veteran-, and minority-owned small business enterprises to participate in procurements and contracts. The Department encourages supplier diversity through certification of woman-, veteran-, and minority-owned small business enterprises and provides advocacy, outreach, and networking through regional business events. For additional information, please contact the Office of Supplier Diversity (OSD) at osdinfo@dms.myflorida.com.

4.5.2 Diversity Reporting.

Upon request, the Contractor will report to the Department its spend with business enterprises certified by the OSD. These reports must include the time period covered, the name and Federal Employer Identification Number of each business enterprise utilized during the period, commodities and contractual services provided by the business enterprise, and the amount paid to the business enterprise on behalf of each agency purchasing under the Contract.

4.6 RESPECT.

Subject to the agency determination provided for in section 413.036, F.S., the following statement applies:

IT IS EXPRESSLY UNDERSTOOD AND AGREED THAT ANY ARTICLES THAT ARE THE SUBJECT OF, OR REQUIRED TO CARRY OUT, THIS CONTRACT SHALL BE PURCHASED FROM A NONPROFIT AGENCY FOR THE BLIND OR FOR THE SEVERELY HANDICAPPED THAT IS QUALIFIED PURSUANT TO CHAPTER 413, FLORIDA STATUTES, IN THE SAME MANNER AND UNDER THE SAME PROCEDURES SET FORTH IN SECTION 413.036(1) AND (2), FLORIDA STATUTES;

AND FOR PURPOSES OF THIS CONTRACT THE PERSON, FIRM, OR OTHER BUSINESS ENTITY CARRYING OUT THE PROVISIONS OF THIS CONTRACT SHALL BE DEEMED TO BE SUBSTITUTED FOR THE STATE AGENCY INSOFAR AS DEALINGS WITH SUCH QUALIFIED NONPROFIT AGENCY ARE CONCERNED.

Additional information about RESPECT and the commodities or contractual services it offers is available at <https://www.respectofflorida.org>.

#### 4.7 PRIDE.

Subject to the agency determination provided for in sections 287.042(1) and 946.515, F.S., the following statement applies:

IT IS EXPRESSLY UNDERSTOOD AND AGREED THAT ANY ARTICLES WHICH ARE THE SUBJECT OF, OR REQUIRED TO CARRY OUT, THIS CONTRACT SHALL BE PURCHASED FROM THE CORPORATION IDENTIFIED UNDER CHAPTER 946, F.S., IN THE SAME MANNER AND UNDER THE SAME PROCEDURES SET FORTH IN SECTION 946.515(2) AND (4), F.S.; AND FOR PURPOSES OF THIS CONTRACT THE PERSON, FIRM, OR OTHER BUSINESS ENTITY CARRYING OUT THE PROVISIONS OF THIS CONTRACT SHALL BE DEEMED TO BE SUBSTITUTED FOR THIS AGENCY INSOFAR AS DEALINGS WITH SUCH CORPORATION ARE CONCERNED.

Additional information about PRIDE and the commodities or contractual services it offers is available at <https://www.pride-enterprises.org>.

### **SECTION 5. COMPLIANCE WITH LAWS.**

#### 5.1 Conduct of Business.

The Contractor must comply with all laws, rules, codes, ordinances, and licensing requirements that are applicable to the conduct of its business, including those of federal, state, and local agencies having jurisdiction and authority. For example, the Contractor must comply with section 274A of the Immigration and Nationality Act, the Americans with Disabilities Act, Health Insurance Portability and Accountability Act, if applicable, and all prohibitions against discrimination on the basis of race, religion, sex, creed, national origin, handicap, marital status, or veteran's status. The provisions of subparagraphs 287.058(1)(a)-(c), and (g), F.S., are hereby incorporated by reference.

#### 5.2 Dispute Resolution, Governing Law, and Venue.

Any dispute concerning performance of the Contract shall be decided by the Department's designated Contract Manager, who will reduce the decision to writing and serve a copy on the Contractor. The decision of the Contract Manager shall be final and conclusive. Exhaustion of this administrative remedy is an absolute condition precedent to the Contractor's ability to pursue legal action related to the Contract or any other form of dispute resolution. The laws of the State of Florida govern the Contract. The Parties submit to the jurisdiction of the courts of the State of Florida exclusively for any legal action related to the Contract. Further, the Contractor hereby waives all privileges and rights relating to venue it may have under Chapter 47, F.S., and all such venue privileges and rights it may have under any other statute, rule, or case law, including, but not limited to, those based on convenience. The Contractor hereby submits to venue in the county chosen by the Department.

#### 5.3 Department of State Registration.

Consistent with Title XXXVI, F.S., the Contractor and any subcontractors that assert status, other than a sole proprietor, must provide the Department with conclusive evidence of a certificate of status, not subject to qualification, if a Florida business entity, or of a certificate of authorization if a foreign business entity.

#### 5.4 Suspended, Convicted, and Discriminatory Vendor Lists.

In accordance with sections 287.042, 287.133, and 287.134, F.S., an entity or affiliate who is on the Suspended Vendor List, Convicted Vendor List, or Discriminatory Vendor List may not perform work as a contractor, supplier, subcontractor, or consultant under the Contract. The Contractor must notify the Department if it or any of its suppliers, subcontractors, or consultants have been placed on the Suspended Vendor List, Convicted Vendor List, or Discriminatory Vendor List during the term of the Contract.

#### 5.5 Scrutinized Companies - Termination by the Department.

The Department may, at its option, terminate the Contract if the Contractor is found to have submitted a false certification as provided under section 287.135(5), F.S., or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or been engaged in business operations in Cuba or Syria, or to have been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel.

#### 5.6 Cooperation with Inspector General and Records Retention.

Pursuant to section 20.055(5), F.S., the Contractor understands and will comply with its duty to cooperate with the Inspector General in any investigation, audit, inspection, review, or hearing. Upon request of the Inspector General or any other authorized State official, the Contractor must provide any information the Inspector General deems relevant to the Contractor's integrity or responsibility. Such information may include, but will not be limited to, the Contractor's business or financial records, documents, or files of any type or form that refer to or relate to the Contract. The Contractor will retain such records for the longer of five years after the expiration of the Contract, or the period required by the General Records Schedules maintained by the Florida Department of State, at the Department of State's Records Management website. The Contractor agrees to reimburse the State of Florida for the reasonable costs of investigation incurred by the Inspector General or other authorized State of Florida official for investigations of the Contractor's compliance with the terms of this or any other agreement between the Contractor and the State of Florida which results in the suspension or debarment of the Contractor. Such costs will include but will not be limited to: salaries of investigators, including overtime; travel and lodging expenses; and expert witness and documentary fees. The Contractor agrees to impose the same obligations to cooperate with the Inspector General and retain records on any subcontractors used to provide goods or services under the Contract.

### **SECTION 6. MISCELLANEOUS.**

#### 6.1 Subcontractors.

The Contractor will not subcontract any work under the Contract without prior written consent of the Department. The Contractor is fully responsible for satisfactory completion of all its subcontracted work. The Department supports diversity in its procurements and contracts, and requests that the Contractor offer subcontracting opportunities to certified woman-, veteran-, and minority-owned small businesses. The

Contractor may contact the OSD at [osdhelp@dms.myflorida.com](mailto:osdhelp@dms.myflorida.com) for information on certified small business enterprises available for subcontracting opportunities.

#### 6.2 Assignment.

The Contractor will not sell, assign, or transfer any of its rights, duties, or obligations under the Contract without the prior written consent of the Department. However, the Contractor may waive its right to receive payment and assign same upon notice to the Department. In the event of any assignment, the Contractor remains responsible for performance of the Contract, unless such responsibility is expressly waived by the Department. The Department may assign the Contract with prior written notice to the Contractor.

#### 6.3 Independent Contractor.

The Contractor and its employees, agents, representatives, and subcontractors are independent contractors and not employees or agents of the State of Florida and are not entitled to State of Florida benefits. The Department and Customer will not be bound by any acts or conduct of the Contractor or its employees, agents, representatives, or subcontractors. The Contractor agrees to include this provision in all its subcontracts under the Contract.

#### 6.4 Inspection and Acceptance of Commodities.

##### 6.4.1 Risk of Loss.

Matters of inspection and acceptance are addressed in section 215.422, F.S. Until acceptance, risk of loss or damage will remain with the Contractor. The Contractor will be responsible for filing, processing, and collecting all damage claims. To assist the Contractor with damage claims, the Customer will: record any evidence of visible damage on all copies of the delivering carrier's bill of lading; report damages to the carrier and the Contractor; and provide the Contractor with a copy of the carrier's bill of lading and damage inspection report.

##### 6.4.2 Rejected Commodities.

When a Customer rejects a commodity, Contractor will remove the commodity from the premises within ten (10) calendar days after notification of rejection, and the risk of loss will remain with the Contractor. Commodities not removed by the Contractor within ten (10) calendar days will be deemed abandoned by the Contractor, and the Customer will have the right to dispose of such commodities. Contractor will reimburse the Customer for costs and expenses incurred in storing or effecting removal or disposition of rejected commodities.

#### 6.5 Safety Standards.

Performance of the Contract for all commodities or contractual services must comply with requirements of the Occupational Safety and Health Act and other applicable State of Florida and federal requirements.

#### 6.6 Ombudsman.

A Vendor Ombudsman has been established within the Department of Financial Services. The duties of this office are found in section 215.422, F.S., which include disseminating information relative to prompt payment and assisting contractors in receiving their payments in a timely manner from a Customer. The Vendor Ombudsman may be contacted at (850) 413-5516.

**6.7 Time is of the Essence.**

Time is of the essence regarding every obligation of the Contractor under the Contract. Each obligation is deemed material, and a breach of any such obligation (including a breach resulting from untimely performance) is a material breach.

**6.8 Waiver.**

The delay or failure by the Department or the Customer to exercise or enforce any rights under the Contract will not constitute waiver of such rights.

**6.9 Modification and Severability.**

The Contract may only be modified by written agreement between the Department and the Contractor. Should a court determine any provision of the Contract is invalid, the remaining provisions will not be affected, and the rights and obligations of the Parties will be construed and enforced as if the Contract did not contain the provision held invalid.

**6.10 Cooperative Purchasing.**

Pursuant to their own governing laws, and subject to the agreement of the Contractor, governmental entities that are not Customers may make purchases under the terms and conditions contained herein, if agreed to by Contractor. Such purchases are independent of the Contract between the Department and the Contractor, and the Department is not a party to these transactions. Agencies seeking to make purchases under this Contract are required to follow the requirements of Rule 60A-1.045(5), F.A.C.

**SECTION 7. LIABILITY AND INSURANCE.**

**7.1 Workers' Compensation Insurance.**

The Contractor shall maintain workers' compensation insurance as required under the Florida Workers' Compensation Law or the workers' compensation law of another jurisdiction where applicable. The Contractor must require all subcontractors to similarly provide workers' compensation insurance for all of the latter's employees. In the event work is being performed by the Contractor under the Contract and any class of employees performing the work is not protected under Workers' Compensation statutes, the Contractor must provide, and cause each subcontractor to provide, adequate insurance satisfactory to the Department, for the protection of employees not otherwise protected.

**7.2 General Liability Insurance.**

The Contractor must secure and maintain Commercial General Liability Insurance, including bodily injury, property damage, products, personal and advertising injury, and completed operations. This insurance must provide coverage for all claims that may arise from performance of the Contract or completed operations, whether by the Contractor or anyone directly or indirectly employed by the Contractor. Such insurance must include the State of Florida as an additional insured for the entire length of the resulting contract. The Contractor is responsible for determining the minimum limits of liability necessary to provide reasonable financial protections to the Contractor and the State of Florida under the resulting contract.

**7.3 Florida Authorized Insurers.**

All insurance shall be with insurers authorized and eligible to transact the applicable line of insurance business in the State of Florida. The Contractor shall provide Certification(s) of Insurance evidencing that all appropriate coverage is in place and showing the Department to be an additional insured.

#### 7.4 Performance Bond.

Unless otherwise prohibited by law, the Department may require the Contractor to furnish, without additional cost to the Department, a performance bond or irrevocable letter of credit or other form of security for the satisfactory performance of work hereunder. The Department shall determine the type and amount of security.

#### 7.5 Indemnification.

To the extent permitted by Florida law, the Contractor agrees to indemnify, defend, and hold the Customer and the State of Florida, its officers, employees, and agents harmless from all fines, claims, assessments, suits, judgments, or damages, including consequential, special, indirect, and punitive damages, including court costs and attorney's fees, arising from or relating to violation or infringement of a trademark, copyright, patent, trade secret, or intellectual property right or out of any acts, actions, breaches, neglect, or omissions of the Contractor, its employees, agents, subcontractors, assignees, or delegates related to the Contract, as well as for any determination arising out of or related to the Contract that the Contractor or Contractor's employees, agents, subcontractors, assignees, or delegates are not independent contractors in relation to the Customer. The Contract does not constitute a waiver of sovereign immunity or consent by the Customer or the State of Florida or its subdivisions to suit by third parties. Without limiting this indemnification, the Customer may provide the Contractor (1) written notice of any action or threatened action, (2) the opportunity to take over and settle or defend any such action at Contractor's sole expense, and (3) assistance in defending the action at Contractor's sole expense.

#### 7.6 Limitation of Liability.

Unless otherwise specifically enumerated in the Contract or in the purchase order, neither the Department nor the Customer shall be liable for special, indirect, punitive, or consequential damages, including lost data or records (unless the Contract or purchase order requires the Contractor to back-up data or records), even if the Department or Customer has been advised that such damages are possible. Neither the Department nor the Customer shall be liable for lost profits, lost revenue, or lost institutional operating savings. The Department or Customer may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor as may be necessary to satisfy any claim for damages, penalties, costs, and the like asserted by or against them. The State may set off any liability or other obligation of the Contractor or its affiliates to the State against any payments due the Contractor under any contract with the State.

### **SECTION 8. PUBLIC RECORDS, TRADE SECRETS, DOCUMENT MANAGEMENT, AND INTELLECTUAL PROPERTY.**

#### 8.1 Public Records.

##### 8.1.1 Termination of Contract.



The Department may terminate the Contract for refusal by the Contractor to comply with this section by not allowing access to all public records, as defined in Chapter 119, F. S., made or received by the Contractor in conjunction with the Contract.

#### 8.1.2 Statutory Notice.

Pursuant to section 119.0701(2)(a), F.S., for contracts for services with a contractor acting on behalf of a public agency, as defined in section 119.011(2), F.S., the following applies:

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT THE TELEPHONE NUMBER, EMAIL ADDRESS, AND MAILING ADDRESS PROVIDED IN THE RESULTING CONTRACT OR PURCHASE ORDER.**

Pursuant to section 119.0701(2)(b), F.S., for contracts for services with a contractor acting on behalf of a public agency as defined in section 119.011(2), F.S., the Contractor shall:

- (a) Keep and maintain public records required by the public agency to perform the service.
- (b) Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, F.S., or as otherwise provided by law.
- (c) Ensure that public records that are exempt or confidential and exempt from public records disclosure are not disclosed except as authorized by law for the duration of the Contract term and following the completion of the Contract if the Contractor does not transfer the records to the public agency.
- (d) Upon completion of the Contract, transfer, at no cost, to the public agency all public records in possession of the Contractor or keep and maintain public records required by the public agency to perform the service. If the Contractor transfers all public records to the public agency upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

#### 8.2 Protection of Trade Secrets or Otherwise Confidential Information.

8.2.1 Contractor Designation of Trade Secrets or Otherwise Confidential Information. If the Contractor considers any portion of materials to be trade secret under section 688.002 or 812.081, F.S., or otherwise confidential under Florida or federal law, the Contractor must clearly designate that portion of the materials as trade secret or otherwise confidential when submitted to the Department. The Contractor will be

responsible for responding to and resolving all claims for access to Contract-related materials it has designated trade secret or otherwise confidential.

#### 8.2.2 Public Records Requests.

If the Department receives a public records request for materials designated by the Contractor as trade secret or otherwise confidential under Florida or federal law, the Contractor will be responsible for taking the appropriate legal action in response to the request. If the Contractor fails to take appropriate and timely action to protect the materials designated as trade secret or otherwise confidential, the Department will provide the materials to the requester.

#### 8.2.3 Indemnification Related to Confidentiality of Materials.

The Contractor will protect, defend, indemnify, and hold harmless the Department for claims, costs, fines, and attorney's fees arising from or relating to its designation of materials as trade secret or otherwise confidential.

#### 8.3 Document Management.

The Contractor must retain sufficient documentation to substantiate claims for payment under the Contract and all other records, electronic files, papers, and documents that were made in relation to this Contract. The Contractor must retain all documents related to the Contract for five (5) years after expiration of the Contract or, if longer, the period required by the General Records Schedules maintained by the Florida Department of State available at the Department of State's Records Management website.

#### 8.4 Intellectual Property.

##### 8.4.1 Ownership.

Unless specifically addressed otherwise in the Contract, the State of Florida shall be the owner of all intellectual property rights to all property created or developed in connection with the Contract.

##### 8.4.2 Patentable Inventions or Discoveries.

Any inventions or discoveries developed in the course, or as a result, of services in connection with the Contract that are patentable pursuant to 35 U.S.C. § 101 are the sole property of the State of Florida. Contractor must inform the Customer of any inventions or discoveries developed or made through performance of the Contract, and such inventions or discoveries will be referred to the Florida Department of State for a determination on whether patent protection will be sought. The State of Florida will be the sole owner of all patents resulting from any invention or discovery made through performance of the Contract.

##### 8.4.3 Copyrightable Works.

Contractor must notify the Department or State of Florida of any publications, artwork, or other copyrightable works developed in connection with the Contract. All copyrights created or developed through performance of the Contract are owned solely by the State of Florida.

### **SECTION 9. DATA SECURITY.**

The Contractor will maintain the security of State of Florida data including, but not limited to, maintaining a secure area around any displayed visible data and ensuring data is stored and secured when not in use. The Contractor and subcontractors will not perform any of the services from outside of the United States, and the Contractor will not allow any State of Florida data to be sent by any medium, transmitted, or accessed outside the United States due to Contractor's action or inaction. In the event of a security breach involving State of Florida data, the Contractor shall give notice to the Customer and the Department within one business day. "Security breach" for purposes of this section will refer to a confirmed event that compromises the confidentiality, integrity, or availability of data. Once a data breach has been contained, the Contractor must provide the Department with a post-incident report documenting all containment, eradication, and recovery measures taken. The Department reserves the right in its sole discretion to enlist a third party to audit Contractor's findings and produce an independent report, and the Contractor will fully cooperate with the third party. The Contractor will also comply with all HIPAA requirements and any other state and federal rules and regulations regarding security of information.

## **SECTION 10. GRATUITIES, LOBBYING, AND COMMUNICATIONS.**

### 10.1 Gratuities.

The Contractor will not, in connection with this Contract, directly or indirectly (1) offer, give, or agree to give anything of value to anyone as consideration for any State of Florida officer's or employee's decision, opinion, recommendation, vote, other exercise of discretion, or violation of a known legal duty, or (2) offer, give, or agree to give to anyone anything of value for the benefit of, or at the direction or request of, any State of Florida officer or employee.

### 10.2 Lobbying.

In accordance with sections 11.062 and 216.347, F.S., Contract funds are not to be used for the purpose of lobbying the Legislature, the judicial branch, or the Department. Pursuant to section 287.058(6), F.S., the Contract does not prohibit the Contractor from lobbying the executive or legislative branch concerning the scope of services, performance, term, or compensation regarding the Contract after the Contract is executed and during the Contract term.

### 10.3 Communications.

#### 10.3.1 Contractor Communication or Disclosure.

The Contractor shall not make any public statements, press releases, publicity releases, or other similar communications concerning the Contract or its subject matter or otherwise disclose or permit to be disclosed any of the data or other information obtained or furnished in compliance with the Contract, without first notifying the Customer's Contract Manager and securing the Customer's prior written consent.

#### 10.3.2 Use of Customer Statements.

The Contractor shall not use any statement attributable to the Customer or its employees for the Contractor's promotions, press releases, publicity releases, marketing, corporate communications, or other similar communications, without first notifying the Customer's Contract Manager and securing the Customer's prior written consent.

## **SECTION 11. CONTRACT MONITORING.**

### **11.1 Performance Standards.**

The Contractor agrees to perform all tasks and provide deliverables as set forth in the Contract. The Department and the Customer will be entitled at all times, upon request, to be advised as to the status of work being done by the Contractor and of the details thereof.

### **11.2 Performance Deficiencies and Financial Consequences of Non-Performance.**

#### **11.2.1 Proposal of Corrective Action Plan.**

In addition to the processes set forth in the Contract (e.g., service level agreements), if the Department or Customer determines that there is a performance deficiency that requires correction by the Contractor, then the Department or Customer will notify the Contractor. The correction must be made within a time-frame specified by the Department or Customer. The Contractor must provide the Department or Customer with a corrective action plan describing how the Contractor will address all performance deficiencies identified by the Department or Customer.

#### **11.2.2 Retainage for Unacceptable Corrective Action Plan or Plan Failure.**

If the corrective action plan is unacceptable to the Department or Customer, or implementation of the plan fails to remedy the performance deficiencies, the Department or Customer will retain ten percent (10%) of the total invoice amount. The retainage will be withheld until the Contractor resolves the performance deficiencies. If the performance deficiencies are resolved, the Contractor may invoice the Department or Customer for the retained amount. If the Contractor fails to resolve the performance deficiencies, the retained amount will be forfeited to compensate the Department or Customer for the performance deficiencies.

### **11.3 Performance Delay.**

#### **11.3.1 Notification.**

The Contractor will promptly notify the Department or Customer upon becoming aware of any circumstances that may reasonably be expected to jeopardize the timely and successful completion (or delivery) of any commodity or contractual service. The Contractor will use commercially reasonable efforts to avoid or minimize any delays in performance and will inform the Department or the Customer of the steps the Contractor is taking or will take to do so, and the projected actual completion (or delivery) time. If the Contractor believes a delay in performance by the Department or the Customer has caused or will cause the Contractor to be unable to perform its obligations on time, the Contractor will promptly so notify the Department and use commercially reasonable efforts to perform its obligations on time notwithstanding the Department's delay.

#### **11.3.2 Liquidated Damages.**

The Contractor acknowledges that delayed performance will damage the Department/Customer, but by their nature such damages are difficult to ascertain. Accordingly, the liquidated damages provisions stated in the Contract documents will apply. Liquidated damages are not intended to be a penalty and are solely intended to compensate for damages.

### **11.4 Force Majeure, Notice of Delay, and No Damages for Delay.**

The Contractor will not be responsible for delay resulting from its failure to perform if neither the fault nor the negligence of the Contractor or its employees or agents contributed to the delay, and the delay is due directly to fire, explosion, earthquake, windstorm, flood, radioactive or toxic chemical hazard, war, military hostilities, terrorism, civil emergency, embargo, riot, strike, violent civil unrest, or other similar cause wholly beyond the Contractor's reasonable control, or for any of the foregoing that affect subcontractors or suppliers if no alternate source of supply is available to the Contractor. The foregoing does not excuse delay which could have been avoided if the Contractor implemented any risk mitigation required by the Contract. In case of any delay the Contractor believes is excusable, the Contractor will notify the Department in writing of the delay or potential delay and describe the cause of the delay either (1) within ten (10) calendar days after the cause that created or will create the delay first arose, if the Contractor could reasonably foresee that a delay could occur as a result, or (2) if delay is not reasonably foreseeable, within five (5) calendar days after the date the Contractor first had reason to believe that a delay could result. The foregoing will constitute the Contractor's sole remedy or excuse with respect to delay. Providing notice in strict accordance with this paragraph is a condition precedent to such remedy. No claim for damages will be asserted by the Contractor. The Contractor will not be entitled to an increase in the Contract price or payment of any kind from the Department for direct, indirect, consequential, impact or other costs, expenses or damages, including but not limited to costs of acceleration or inefficiency, arising because of delay, disruption, interference, or hindrance from any cause whatsoever. If performance is suspended or delayed, in whole or in part, due to any of the causes described in this paragraph, after the causes have ceased to exist the Contractor will perform at no increased cost, unless the Department determines, in its sole discretion, that the delay will significantly impair the value of the Contract to the State of Florida or to Customers, in which case the Department may (1) accept allocated performance or deliveries from the Contractor, provided that the Contractor grants preferential treatment to Customers and the Department with respect to commodities or contractual services subjected to allocation, or (2) purchase from other sources (without recourse to and by the Contractor for the related costs and expenses) to replace all or part of the commodity or contractual services that are the subject of the delay, which purchases may be deducted from the Contract quantity, or (3) terminate the Contract in whole or in part.

## **SECTION 12. CONTRACT AUDITS.**

### **12.1 Performance or Compliance Audits.**

The Department may conduct or have conducted performance and/or compliance audits of the Contractor and subcontractors as determined by the Department. The Department may conduct an audit and review all the Contractor's and subcontractors' data and records that directly relate to the Contract. To the extent necessary to verify the Contractor's fees and claims for payment under the Contract, the Contractor's agreements or contracts with subcontractors, partners, or agents of the Contractor, pertaining to the Contract, may be inspected by the Department upon fifteen (15) calendar days' notice, during normal working hours and in accordance with the Contractor's facility access procedures where facility access is required. Release statements from its subcontractors, partners, or agents are not required for the Department or its designee to conduct compliance and performance audits on any of the Contractor's contracts relating to this Contract. The Inspector General, in accordance with section 5.6, the State of Florida's Chief Financial Officer, the Office of the Auditor General also have authority to perform audits and inspections.

## 12.2 Payment Audit.

Records of costs incurred under terms of the Contract will be maintained in accordance with section 8.3 of these Special Contract Conditions. Records of costs incurred will include the Contractor's general accounting records, together with supporting documents and records of the Contractor and all subcontractors performing work, and all other records of the Contractor and subcontractors considered necessary by the Department, the State of Florida's Chief Financial Officer, or the Office of the Auditor General.

## **SECTION 13. BACKGROUND SCREENING AND SECURITY.**

### 13.1 Background Check.

The Department or Customer may require the Contractor to conduct background checks of its employees, agents, representatives, and subcontractors as directed by the Department or Customer. The cost of the background checks will be borne by the Contractor. The Department or Customer may require the Contractor to exclude the Contractor's employees, agents, representatives, or subcontractors based on the background check results. In addition, the Contractor must ensure that all persons have a responsibility to self-report to the Contractor within three (3) calendar days any arrest for any disqualifying offense. The Contractor must notify the Contract Manager within twenty-four (24) hours of all details concerning any reported arrest. Upon the request of the Department or Customer, the Contractor will re-screen any of its employees, agents, representatives, and subcontractors during the term of the Contract.

### 13.2 E-Verify.

The Contractor must use the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired during the term of the Contract for the services specified in the Contract. The Contractor must also include a requirement in subcontracts that the subcontractor must utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the Contract term. In order to implement this provision, the Contractor must provide a copy of its DHS Memorandum of Understanding (MOU) to the Contract Manager within five (5) calendar days of Contract execution. If the Contractor is not enrolled in DHS E-Verify System, it will do so within five (5) calendar days of notice of Contract award and provide the Contract Manager a copy of its MOU within five (5) calendar days of Contract execution. The link to E-Verify is <https://www.uscis.gov/e-verify>. Upon each Contractor or subcontractor new hire, the Contractor must provide a statement within five (5) calendar days to the Contract Manager identifying the new hire with its E-Verify case number.

### 13.3 Disqualifying Offenses.

If at any time it is determined that a person has been found guilty of a misdemeanor or felony offense as a result of a trial or has entered a plea of guilty or nolo contendere, regardless of whether adjudication was withheld, within the last six (6) years from the date of the court's determination for the crimes listed below, or their equivalent in any jurisdiction, the Contractor is required to immediately remove that person from any position with access to State of Florida data or directly performing services under the Contract. The disqualifying offenses are as follows:

- (a) Computer related crimes;
- (b) Information technology crimes;

- (c) Fraudulent practices;
- (d) False pretenses;
- (e) Frauds;
- (f) Credit card crimes;
- (g) Forgery;
- (h) Counterfeiting;
- (i) Violations involving checks or drafts;
- (j) Misuse of medical or personnel records; and
- (k) Felony theft.

#### 13.4 Confidentiality.

The Contractor must maintain confidentiality of all confidential data, files, and records related to the commodities or contractual services provided pursuant to the Contract and must comply with all state and federal laws, including, but not limited to sections 381.004, 384.29, 392.65, and 456.057, F.S. The Contractor's confidentiality procedures must be consistent with the most recent version of the Department security policies, protocols, and procedures. The Contractor must also comply with any applicable professional standards with respect to confidentiality of information.

#### **SECTION 14. WARRANTY OF CONTRACTOR'S ABILITY TO PERFORM.**

The Contractor warrants that, to the best of its knowledge, there is no pending or threatened action, proceeding, or investigation, or any other legal or financial condition, that would in any way prohibit, restrain, or diminish the Contractor's ability to satisfy its Contract obligations. The Contractor warrants that neither it nor any affiliate is currently on the Suspended Vendor List, Convicted Vendor List, or the Discriminatory Vendor List, or on any similar list maintained by any other state or the federal government. The Contractor shall immediately notify the Department in writing if its ability to perform is compromised in any manner during the term of the Contract.

**Information Technology Staff Augmentation Services  
Contract No. 80101507-21-STC-ITSA**

**Contract Exhibit F  
Resume Self-Certification Form**

Contractor's candidates shall complete this Resume Self-Certification Form. Completed Resume Self-Certification Forms shall be submitted within the Contractor's response to Customer's requests for quote.

"I the undersigned do hereby certify, under the penalty of perjury, that information in my resume submitted for consideration of the State of Florida contract position is true, correct, complete, and made in good faith to the best of my knowledge and belief. If an omission, falsification, misstatement, or misrepresentation has been made regarding my education, work ability, experience, employment history, and/or fitness for employment as a contractor, I may be disqualified as a contractor, and the matter will be reported to appropriate agency or law enforcement personnel. I understand that there may be civil and/or criminal penalties for misrepresenting pertinent information in connection with contract positions, including, but not limited to, penalties available under sections 287.133 or 817.566, Florida Statutes. I further understand that if I am not a United States citizen, violation cases may be reported to the US Department of Homeland Security for potential deportation."

"In addition, I the undersigned do hereby consent to the release of my information by employers, educational institutions, law enforcement agencies, and other individuals and organizations to investigators and other authorized agents of Florida for verification and investigation purposes. I understand that any documents submitted to procure a contract(s) with the State of Florida, including resumes, are public records."

\_\_\_\_\_  
Print Full Legal Name of Candidate

\_\_\_\_\_  
Candidate's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Candidate's Form of Identification Presented

\_\_\_\_\_  
Identification number

\_\_\_\_\_  
Contractor's Witness Signature One      Date

\_\_\_\_\_  
Contractor's Witness Signature Two      Date

\_\_\_\_\_  
Print Name Contractor's Witness One

\_\_\_\_\_  
Print Name Contractor's Witness Two



**Information Technology Staff Augmentation Services  
Contract No. 80101507-21-STC-ITSA**

**Contract Exhibit G  
Contractor Selection Justification Form**

Customers shall complete this Contractor Selection Justification Form for each candidate selected and attach all completed forms to the purchase order.

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

Contractor's Name: \_\_\_\_\_

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

Contractor's Contact Information: \_\_\_\_\_

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

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

Candidate's Name: \_\_\_\_\_

Date Candidate will be available: \_\_\_\_\_

Hourly rate of candidate: \$ \_\_\_\_\_

Position candidate recommended for: \_\_\_\_\_

Justification for selection of candidate:  
\_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agency: \_\_\_\_\_ Division/Section/Unit: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

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

**Information Technology Staff Augmentation Services  
Contract No. 80101507-21-STC-ITSA**

**Contract Exhibit H  
Contractor Performance Survey**

**Note: This is an example of the questions contained in the Contractor Performance Survey. The actual survey will be provided in electronic form.** Customers shall complete this Contractor Performance Survey for each Contractor on a quarterly basis. Customers will electronically submit the completed Contractor Performance Survey(s) to the Department Contract Manager no later than the due date indicated the Scope of Work.

Contractor's Name: \_\_\_\_\_ Quarter: \_\_\_\_\_

Purchase Order (PO) Number: \_\_\_\_\_ PO Total \$ Amount: \_\_\_\_\_

PO Starting Date \_\_\_\_\_ Ending Date \_\_\_\_\_

Please review the attached Rating Definitions and provide your opinion by rating the following:

**Quality of Service**

- 1. Effectiveness performing tasks 3  2  1
- 2. Quality & completeness of work 3  2  1

**Cost Control**

- 3. Accurately estimated and controlled costs to complete work 3  2  1
- 4. Submitted, timely, accurate & complete invoices 3  2  1

**Timeliness of Performance**

- 5. Adherence to delivery schedule (major tasks, milestones) 3  2  1
- 6. Timely, current & complete reporting, tracking & documentation 3  2  1

**Business Relations**

- 7. Effectively communicated with Agency management & staff 3  2  1
- 8. Contractor staff was professional, cooperative & flexible 3  2  1

**Customer Satisfaction**

- 9. Overall Satisfaction with Contractor 3  2  1

Comments:

\_\_\_\_\_  
\_\_\_\_\_

Agency: \_\_\_\_\_ Division/Section/Unit: \_\_\_\_\_

Rater's Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

Rater's Signature \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

## **Contractor Performance Survey Rating Definitions**

### **Excellent (3)**

- There are no quality problems.
- There are no cost issues.
- There are no delays.
- Responses to inquiries, technical, service, and administrative issues are effective and responsive.

### **Acceptable (2)**

- Non-conformances do not impact achievement of contract requirements.
- Cost issues do not impact achievement of contract requirements.
- Delays do not impact achievement of contract requirements.
- Response to inquiries, technical, service, and administrative issues is usually effective and responsive.

### **Poor (1)**

- Non-conformances are compromising the achievement of contract requirements.
- Cost issues are compromising performance of contract requirements.
- Delays are compromising the achievement of contract requirements.
- Response to inquiries, technical, service, and administrative issues is not effective and responsive.

---

**Scoring:** Ratings will be averaged together and then rounded to achieve the Overall Contractor Performance Rating.

**CONTRACT EXHIBIT I**  
**PREFERRED PRICING AFFIDAVIT**

This preferred-pricing affidavit is entered into in accordance with section 216.0113, F.S., and as required by Contract No. 80101507-21-STC-ITSA ("Contract") between \_\_\_\_\_ ("Contractor") and the Department of Management Services.

As the person authorized by Contractor to sign this affidavit, I attest that the Contractor is in full compliance with the preferred-pricing clause of the Contract.

Contractor's Name: \_\_\_\_\_

By: \_\_\_\_\_

Signature

Printed Name/Title

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

STATE OF \_\_\_\_\_ COUNTY OF \_\_\_\_\_

Sworn to (or affirmed) and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, by \_\_\_\_\_.

\_\_\_\_\_  
Signature of Notary  
(Print, Type, or Stamp Commissioned Name of Notary Public)

[Check One]  Personally Known OR  Produced the following I.D. \_\_\_\_\_

Vendor Name: \_\_\_\_\_ FEIN# \_\_\_\_\_

Vendor's Authorized Representative Name and Title: \_\_\_\_\_

Address:

City, State, and Zip code: \_\_\_\_\_

Phone Number: (\_\_\_\_) \_\_\_\_-\_\_\_\_ E-mail: \_\_\_\_\_

**CORPORATE SEAL (IF APPLICABLE)**

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: APPLICATIONS DEVELOPMENT

**Job Title: Director, Systems and Programming**

**Job#: 1200**

#### **General Characteristics**

Responsible for the full systems development life cycle management of projects/programs. Provides direction for technical and business resources. Actively participates in long-range strategy planning and manages policy development to address complex business issues, provides leadership to cross-functional teams. Serves as the primary point of contact from project/program inception to delivery. Defines and develops project management infrastructure, manages a methodology driven quality plan, monitors and controls the quality of the deliverable, as well as manages the project completion process through customer acceptance. Works with business unit managers and forms alliances on projects, operational decisions, scheduling requirements/conflicts and vendor contract clarification.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 10 years of IT and business/industry work experience, with at least 3 years of leadership experience in managing multiple, large, cross-functional teams or projects, and influencing senior level management and key stakeholders. Requires advanced technical and business knowledge in software development life cycle, quality assurance, project management and other related disciplines/processes.

##### **Breadth:**

Senior level management in systems analysis and applications development. Has overall responsibility for department decisions and management. Provides strategic direction, coaches and mentors more junior management staff and/or senior technical staff. Accountable for IT functional/departmental results. Frequently reports to a Chief Information Officer or Chief Technology Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: APPLICATIONS DEVELOPMENT

**Job Title: Manager, Applications Development**

**Job#: 1210**

#### **General Characteristics**

Coordinates systems analysis and applications development activities through direct and indirect staff. Directs development teams in the areas of scheduling, technical direction, future planning and standard development practices. Participates in budgeting and capital equipment processes and quality improvement activities for the development organization. Meets scheduled milestones to ensure project/ program objectives are met in a timely manner and has an in-depth knowledge of the principles, theories, practices and techniques for managing the activities related to planning, managing and implementing systems analysis and applications development projects and programs.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT and business work experience including managing team(s) in systems analysis and/or programming functions.

##### **Breadth:**

Middle level management in systems analysis and programming functions. Typically manages and mentors supervisors, project leads and/or technical staff. Works under general direction of senior level management. Frequently reports to a Director, Systems and Programming, Departmental IT Executive or Operating Unit IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: APPLICATIONS DEVELOPMENT

**Job Title: Applications Architect**

**Job#: 1220**

##### **General Characteristics**

Provides design recommendations based on long-term IT organization strategy. Develops enterprise level application and custom integration solutions including major enhancements and interfaces, functions and features. Uses a variety of platforms to provide automated systems applications to customers. Provides expertise regarding the integration of applications across the business. Determines specifications, then plans, designs, and develops the most complex and business critical software solutions, utilizing appropriate software engineering processes—either individually or in concert with project team. Will assist in the most difficult support problems.

Develops programming and development standards and procedures as well as programming architectures for code reuse. Has in-depth knowledge of state-of-the art programming languages and object-oriented approaches in designing, coding, testing and debugging programs. Understands and consistently applies the attributes and processes of current application development methodologies. Researches and maintains knowledge in emerging technologies and possible application to the business. Viewed both internally and externally as a technical expert and critical technical resource across multiple disciplines. Acts as an internal consultant, advocate, mentor and change agent.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of experience in multiple IT areas and 2–3 years of relevant architecture experience. Requires advanced to expert level knowledge and understanding of architecture, applications systems design and integration.

###### **Complexity:**

Expert/lead technical role. Typically works on multiple IT projects as a project leader. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: APPLICATIONS DEVELOPMENT****Job Title: Enterprise Application Integration (EAI) Engineer****Job#: 1230****General Characteristics**

Responsible for developing and deploying integrated solutions aimed at modernizing, consolidating and coordinating the independently designed applications within and across the enterprises. Determines how existing applications, legacy systems, databases, Web interfaces and/or hardware logic, which may be currently operating on multiple platforms, work together to meet the new and emerging enterprise requirements. Develops methods to efficiently reuse existing components. Works with users to gather business requirements, performs database analysis, codes and tests middleware routines to ensure successful and seamless communication among the various IT systems and applications components. Participates in component and data architecture design, software product evaluation and buy vs. build recommendations. Possesses skills and knowledge of Enterprise Application Integration (EAI) methodologies and processes such as object-oriented programming, distributed, cross-platform program communication using message brokers with Common Object Request Broker Architecture, enterprise-wide content and data distribution using common databases and data standards implemented with the Extensible Markup Language (XML), middleware applications and message queuing approaches.

**Dimensions****Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 5 years of programming/systems analysis experience with emphasis in applications and systems architectural design and development, database and middleware technologies.

**Complexity:**

Advanced professional level role. Works on projects that may span a broad range of systems and enterprise-wide complex components. Requires in-depth knowledge across multiple technical environments and possesses increased level of business knowledge. Works on major projects providing subject matter expertise and technical direction to more junior technical staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: APPLICATIONS DEVELOPMENT

**Job Title: Systems Analyst**

**Job#: 1240**

**General Characteristics**

Responsible for the design and development of IT systems. Develops design and functional specifications, produces deliverables related to the project(s) assigned and assists in post implementation support and system enhancements. Responsible for selecting appropriate C.A.S.E. tools to develop systems and software. Responsible for gathering, compiling and synthesizing information with regard to technology processes or systems. Possesses experience in minicomputer or client/server environments including the implementation and support of resource planning, sales automation, marketing, financial and distribution systems.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of systems analysis/programming experience.

**Complexity:**

Intermediate professional level role. Develops systems solutions requiring analysis and research. Works on small to large, complex projects that require increased skill in multiple technical environments and possesses knowledge in a specific business area. Works on one or more projects as a project team member or sometimes as a project lead. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: APPLICATIONS DEVELOPMENT

**Job Title: Applications Development Analyst**

**Job#: 1250**

##### **General Characteristics**

Works closely with customers, business analysts, and team members to understand business requirements that drive the analysis and design of quality technical solutions. These solutions must be aligned with business and IT strategies and comply with the organization's architectural standards. Involved in the full systems life cycle and is responsible for designing, coding, testing, implementing, maintaining and supporting applications software that is delivered on time and within budget. Makes recommendations towards the development of new code or reuse of existing code. Responsibilities may also include participation in component and data architecture design, performance monitoring, product evaluation and buy vs. build recommendations. Has experience in systems analysis, design and a solid understanding of development, quality assurance and integration methodologies.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 2 years of programming/systems analysis experience.

###### **Complexity:**

Intermediate professional level role. Develops solutions requiring analysis and research. Works on small to large, complex projects that require increased skill in multiple technical environments and possesses knowledge in a specific business area. Works on one or more projects as a project team member or occasionally as a project lead. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: DATA STRATEGY AND MANAGEMENT

**Job Title: Database Manager**

**Job#: 1400**

**General Characteristics**

Responsible for ensuring the design, maintenance and implementation of database management systems, which provides the organization with orderly methods of data storage and controlled access to data. Possesses the technical expertise to provide leadership and manage the design and development of the organization's database environment. Ensures the design and installation of database management system applications and the establishment of the appropriate linkages to existing database applications and to other data processing systems. Ensures the development of a backup and recovery scheme for the database environment and the development and implementation of disaster recovery and business continuance procedures.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of experience in development, implementation and maintenance of database management systems across multiple platforms. Requires prior management, supervisory or team leader experience including project management experience.

**Breadth:**

Middle level management in database management and administration functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Frequently reports to a Chief Technology Officer, IT Chief Operating Officer, Director, Systems and Programming, Operating Unit IT Executive or Departmental IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: DATA STRATEGY AND MANAGEMENT

**Job Title: Data Architect**

**Job#: 1410**

##### **General Characteristics**

Responsible for enterprise-wide data design, balancing optimization of data access with batch loading and resource utilization factors. Knowledgeable in most aspects of designing and constructing data architectures, operational data stores, and data marts. Focuses on enterprise-wide data modeling and database design. Defines data architecture standards, policies and procedures for the organization, structure, attributes and nomenclature of data elements, and applies accepted data content standards to technology projects. Responsible for business analysis, data acquisition and access analysis and design, Database Management Systems optimization, recovery strategy and load strategy design and implementation.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of experience with large and complex database management systems.

###### **Complexity:**

Expert/lead technical role. Defines and plans database architectures for enterprise systems. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: DATA STRATEGY AND MANAGEMENT

**Job Title: Data Modeler**

**Job#: 1420**

**General Characteristics**

Accountable for analyzing and developing complex logical database designs, logical data models and relational data definitions in support of corporate and customer information systems requirements. Understands the methodologies and technologies that depict the flow of data within and between technology systems and business functions/operations. Responsible for the identification and resolution of information flow, content issues and the transformation of business requirements into logical data models. This position identifies opportunities to reduce data redundancy, trends in data uses and single sources of data.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 4 years of IT work experience in data modeling, data analysis, relational DBMS design and support and relevant computing environments.

**Complexity:**

Intermediate professional level role. Designs logical data models of low to medium complexity. Works on small to large, complex projects that require increased skill in multiple technical environments. Works on one or more projects as a project team member or sometimes as a project lead. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: DATA STRATEGY AND MANAGEMENT

**Job Title: Database Analyst**

**Job#: 1430**

##### **General Characteristics**

Responsible for designing, modeling, developing and supporting Database Management Systems (DBMS). Analyzes data requirements, application and processing architectures, data dictionaries, and database schema(s), and then designs, develops, amends, optimizes, and certifies database schema design to meet system(s) requirements. Gathers, analyzes, and normalizes relevant information related to, and from business processes, functions, and operations to evaluate data credibility and determine relevance and meaning. Develops database and warehousing designs across multiple platforms and computing environments. Develops an overall data architecture that supports the information needs of the business in a flexible but secure environment.

##### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in DBA, DBMS design and support and relevant computing environments.

##### **Complexity:**

Intermediate professional level role. Designs and supports DBMS of low to medium complexity. Works on one or more projects as a project team member or sometimes as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: DATA STRATEGY AND MANAGEMENT

**Job Title: Database Administrator**

**Job#: 1440**

**General Characteristics**

Manages and maintains all production and non-production databases. Responsible for standards and design of physical data storage, maintenance, access and security administration. Performs backup and recovery on Database Management Systems, configures database parameters, and prototype designs against logical data models, defines data repository requirements, data dictionaries and warehousing requirements. This position optimizes database access and allocates/re-allocates database resources for optimum configuration, database performance and cost.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of experience working with various database management systems in database design, testing, implementation, maintenance and administration in a multiple platform environment.

**Complexity:**

Intermediate professional level role. Supports multiple services and multiple databases of medium to high complexity (complexity defined by database size, technology used, systems feeds and interfaces) with multiple concurrent users, ensuring control, integrity and accessibility of data. Works on multiple projects as a project leader or sometimes as a project advisor. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: QUALITY ASSURANCE

**Job Title: Manager, Quality Assurance**

**Job#: 1600**

#### **General Characteristics**

Responsible for managing the definition, implementation and integration of quality principles and quality processes into the design and development of software and IT processes. Ensures that quality methods and procedures are executed. Ensures that products, applications, and systems are in compliance with established quality standards, and meet customer requirements. Analyzes best-in-class processes, establishes customer satisfaction metrics, understands the interaction and relationship of business operations and operating systems and network processes. Champions the application of quality principles in business and IT processes through training, meeting and team facilitation, communication programs and team building activities. Responsible for researching, developing and implementing testing methods and procedures. Ensures that products meet the highest quality standards. Monitors and reports on defects.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of systems development and business experience. Experience in developing and conducting test processes for multiple types of systems, client users and/or units across an organization. Requires prior management, supervisory or team leader experience.

##### **Breadth:**

Middle level management in quality assurance functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Acts as a project leader and a subject matter expert on multiple and complex projects. Frequently reports to a IT Chief Operating Officer, Operating Unit IT Executive, Departmental IT Executive or Director, Systems and Programming.



**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: QUALITY ASSURANCE****Job Title: Quality Engineering Consultant****Job#: 1610****General Characteristics**

Responsible for establishing and implementing quality assurance and compliance processes for the IT organization. Works closely with IT leaders to develop and implement an overall quality maturity roadmap and plan for each IT functional area. Works with development, testing and production teams to develop, publish and implement software quality assurance plans. Reviews progress toward the plan regularly with IT leaders, technical teams and customers to make modifications as necessary. Establishes internal IT service quality control standards, policies and procedures. Monitors, evaluates, manages and executes audit processes to ensure compliance. Coordinates and facilitates quality assurance activities across projects with project managers. Provides guidance and subject matter expertise to IT teams on QA methodologies and processes, educates them on their responsibilities/accountabilities for the purpose of achieving on-time and quality deliverables. Makes recommendations and directs improvements to the software development lifecycle process. Documents non-compliance to policies, process and standards and assists in their resolution. Analyzes and identifies trends in IT performance metrics. Designs, monitors and analyzes performance metrics program for quality improvement initiatives. Conducts audits and analyzes findings to develop appropriate corrective action recommendations. Provides training on established processes and policies. Needed skills and knowledge include systems lifecycle development, project management, quality management and improvement methodologies and standards such as Total Quality Management (TQM), Six Sigma and the Software Engineering Institute—Capability Maturity Model (SEI-CMM).

**Dimensions****Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT and business experience, with at least 5 years in Quality Assurance, 2 to 3 years of audit or assessment or other relevant experience.

**Complexity:**

Expert/lead technical role. Provides strategic direction, guidance and integrated solutions to enterprise-wide quality engineering initiatives. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: QUALITY ASSURANCE

**Job Title: Quality Assurance Analyst**

**Job#: 1620**

#### **General Characteristics**

Responsible for developing and executing formal test plans to ensure the delivery of quality software applications. Involved in test planning, writing test cases/scripts, test case automation and test execution. Defines and tracks quality assurance metrics such as defects, defect counts, test results and test status. Collects and analyzes data for software process evaluation and improvements, and integrates them into business processes to address the business needs. Documents all problems and assists in their resolution. Delivers quality process training to technical staff and acts as an internal quality consultant to advise or influence business or technical partners. Performs quality audits across the various IT functions to ensure quality standards, procedures and methodologies are being followed.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or similar. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of systems development, testing and/or business experience.

##### **Complexity:**

Intermediate professional level role. Works on projects of moderate to high complexity within one or more development environments. Works on multiple programs/systems as a project team member. Considered a subject matter expert for a single program/system. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TECHNOLOGY RESEARCH

**Job Title: Manager, Technology Research**

**Job#: 1800**

##### **General Characteristics**

Understands the strategic direction of enterprise and the supporting IT systems and architectures. Maintains knowledge of emerging technological trends and utilizes this knowledge to educate both IT and the business on opportunities to build better IT solutions that support and drive business decisions. Assists in the definition of the architecture and technology needs of the organization based on new and emerging technologies, and establishes priorities and strategies consistent with business goals and economic viability. Establishes foundation architecture for organization to standardize on hardware and software usage. Serves as a consultant and advisor to senior IT leadership on advanced technologies and evaluates the business impact through cost/benefit analysis. Recommends and incorporates technology with long-term business plans. Transfers knowledge of key learnings throughout the enterprise, and establishes and communicates strategic and technological plans.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for systems development and architecture functions.

###### **Breadth:**

Middle level management in technology research area. Works under general direction from senior level management. Works on multiple programs as a project team leader and a subject matter expert. Manages and mentors supervisors, project leaders and/or technical staff. Frequently reports to a Chief Technology Officer, Operating Unit IT Executive or Departmental IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TECHNOLOGY RESEARCH

**Job Title: Technology Research Analyst**

**Job#: 1810**

#### **General Characteristics**

Maintains a strong understanding of the enterprise's IT systems and architectures. Assists in the analysis of the requirements for the enterprise and applying emerging technologies to support long-term business objectives. Responsible for researching, collecting, and disseminating information on emerging technologies and key learnings throughout the enterprise. Researches and recommends changes to foundation architecture. Supports research projects to identify and evaluate emerging technologies. Interfaces with users and staff to evaluate possible implementation of the new technology in the enterprise, consistent with the goal of improving existing systems and technologies and in meeting the needs of the business. Analyzes and researches process of deployment and assists in this process.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in architecture design, systems analysis and development.

##### **Complexity:**

Intermediate professional level role. Works on projects of moderate to high complexity across multiple computing environments. Works on multiple projects as a project team member. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CLIENT TECHNOLOGIES

**Job Title: Manager, Client Technologies**

**Job#: 2000**

#### **General Characteristics**

Responsible for providing IT users with desktop equipment and support, determining user needs and incorporating them into the design and overall plan for desktop support. The range of accountabilities minimally covers hardware and software planning, vendor selection, acquisition, Tier 2 problem resolution, set-up, integration, testing and installation. Works with organizations supported to establish performance metrics to ensure needs are being properly met. Monitors and analyzes performance metrics, sharing results with users. Organizes and coordinates the activities associated with installation, deployment and upgrade of software, hardware and network facilities as it relates to the desktop environment. Desktop applications may include productivity tools, email, and applications that are used by groups without programming customization. Evaluates and provides techniques for increasing user desktop productivity.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for desktop support function. Experience in managing support operation in a 24x7, multi-site environment. Experience with budgeting, expense management and contract management.

##### **Breadth:**

Middle level management in PC/desktop support and maintenance functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Frequently reports to an IT Chief Operating Officer, Operating Unit IT Executive or Departmental IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CLIENT TECHNOLOGIES

**Job Title: Client Technologies Analyst**

**Job#: 2010**

##### **General Characteristics**

Configures, installs, monitors and maintains IT users' desktop software and hardware; supports mobile workforce. Provides consultation to IT users for all aspects of end-user computing and desktop-based LAN systems software. Provides technical support and guidance through Tier 2 support and works with vendors to resolve Tier 3 issues. Responsible for documenting solutions to problems and developing end-user guidelines. May provide on-site training to users. Evaluates, maintains, modifies (e.g., creates macros, templates) and documents desktop application packages, participates in the testing and evaluation of new desktop packages and implements prototypes. Consults with and makes recommendations to IT users on selection of hardware and software products to address business requirements.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in supporting desktop software and hardware products and problem solving/troubleshooting.

###### **Complexity:**

Intermediate professional level role. Provides maintenance and support for moderately complex to complex client products. Works on one or more projects concurrently as a project team member. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CLIENT TECHNOLOGIES

**Job Title: Client Technologies Technician**

**Job#: 2020**

#### **General Characteristics**

Configures and installs software for IT users' desktops and laptops. Involved in the installation and rollout of new software packages, upgrades and new desktop hardware. Maintains desktop software and hardware; supports mobile workforce. Provides Tier 2 support to IT users for basic software and hardware of end-user computing and desktop-based LAN systems. Troubleshoots problems using scripts and checklists as guides. Escalates to Tier 3 support when necessary. Documents problems and resolutions. May perform end-user training. Strong customer service skills are important in this position. Participates in the testing and evaluation of new desktop packages and implements prototypes.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree, or technical institute degree/certificate. Or equivalent work experience.

##### **Experience:**

A minimum of 1 year of IT work experience with demonstrated working knowledge of the basic hardware and software products and problem solving/troubleshooting skills.

##### **Complexity:**

Learner/entry level role. Provides maintenance and support for basic client products, peripherals, network and physical moves. Works on one project at a time as a project team member. Functions, somewhat independently, under direction of senior technician or supervisor/manager. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CUSTOMER SUPPORT

**Job Title: Manager, Customer Support**

**Job#: 2200**

#### **General Characteristics**

Defines service levels, service agreements and manages the help desk operation. Establishes processes to identify, track, escalate, resolve and report customer problems. Jointly, with the customer, defines standards and measures for quality and customer satisfaction requirements. Analyzes the technical performance and reliability of products, systems and services against identified industry standards to ensure customer satisfaction. Responsible for developing and implementing technical service restorations and troubleshooting procedures for identifying, testing and diagnosing computer system and peripheral equipment faults.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for desktop support, customer service and/or production support in multi-platform environments.

##### **Breadth:**

Middle level management in help desk/customer support functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Frequently reports to an IT Chief Operating Officer, Operating Unit IT Executive or Departmental IT Executive.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CUSTOMER SUPPORT

**Job Title: Customer Support Analyst**

**Job#: 2210**

#### **General Characteristics**

Responsible for Tier 1 and 2 software and hardware support. Provides technical advice, guidance and informal training to customers using hardware and software programs. Troubleshoots and restores routine technical service and equipment problems by analyzing, identifying and diagnosing faults and symptoms using established processes and procedures. Performs root cause analysis and develops checklists for typical problems. Recommends procedures and controls for problem prevention. Maintains knowledge database and call tracking database to enhance quality of problem resolutions. Works in a team setting, sharing information and assisting others with calls.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 2 years of IT work experience with demonstrated working knowledge of basic to moderately complex hardware and software products and problem solving/troubleshooting skills.

##### **Complexity:**

Intermediate professional level role. Provides Tier 1 and Tier 2 support of medium to high complexity. Works in a team as a team member. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: CUSTOMER SUPPORT

**Job Title: Customer Support Technician**

**Job#: 2220**

**General Characteristics**

Responsible for Tier I software and hardware support. Diagnoses and resolves problems using documented procedures and checklists in the performance of most responsibilities. Enters call data into a tracking system. Escalates problems to higher level technical support professionals when necessary. Assists in the resolution of application, hardware and software problems.

**Dimensions**

**Education:**

Associate's or Bachelor's Degree, or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 1 year of IT work experience in computer systems or support with demonstrated working knowledge of basic hardware and software products and problem solving/troubleshooting skills.

**Complexity:**

Learner/entry level role. Provides Tier 1 support of low to medium complexity. Functions, somewhat independently, under general direction of more senior customer service representatives, supervisors or managers. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Director, Network Operations**

**Job#: 2400**

##### **General Characteristics**

Responsible for developing business and technology standards and best practices for department. Overall responsibility for all network operations work, including the integration of new network technologies such as wireless. Develops enterprise service levels for data and voice networking equipment and for both in-house and third party software applications. Oversees development of procedures and processes for enterprise network operations. Responsible for ensuring that the enterprise has the capability to support new technologies and maintain high levels of network performance and reliability.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 10 years of IT and business/industry work experience, with at least 3 years of leadership experience in managing multiple, large, cross-functional teams or projects, and influencing senior level management and key stakeholders. Experience in areas such as data communications software and hardware, network administration, support and maintenance.

###### **Breadth:**

Senior level management in network operations and management functions. Has overall responsibility for department decisions and management. Provides strategic direction, coaches and mentors more junior management staff. Accountable for IT functional/departmental results. Frequently reports to a Chief Information Officer or IT Chief Operating Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Manager, Network Operations**

**Job#: 2410**

**General Characteristics**

Responsible for network operations and service levels for data and voice networking equipment and software including mainframe equipment, PBX, mid-range and network processing devices. Develops and implements standards, procedures, and processes for the network operations group. Plans and manages the support of new technologies (including wireless), network performance, and reliability. Defines and negotiates service level agreements. Oversees and coordinates the daily activities of the network operations center. Plans for human resources, equipment arrangements, electrical power and cable requirements for telecommunications and information processing equipment.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for technical service for hardware/software engineering, support and maintenance in LAN/WAN and multi-platform environment.

**Breadth:**

Middle level management in network operations functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Frequently reports to an IT Chief Operating Officer, Director, Network Operations or Operating Unit IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Network Architect**

**Job#: 2420**

##### **General Characteristics**

Responsible for high-level network planning, design, and optimization. Develops strategies and direction for network systems solutions using current and emerging technologies (including wireless). Translates business requirements into network or process designs. Plans and recommends network hardware, systems management software and architecture. Approves and modifies network design and architecture to ensure compliance. Configures and maintains routers, switches, and hubs for the network systems (including wireless). Evaluates and recommends new products, maintains knowledge of emerging technologies for application to the enterprise. Monitors network performance, ensures capacity planning is performed, and is proactive in assessing and making recommendations for improvement. Performs troubleshooting procedures and designs resolution scripts. May take on role of Project Leader for special enterprise-wide assignments.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT work experience in infrastructure/network environments performing network planning, architecture design, engineering (hardware and software) and optimization.

###### **Complexity:**

Expert/lead technical role. Defines network architectures and design for the enterprise. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Network Engineer**

**Job#: 2430**

#### **General Characteristics**

Assists in the planning, forecasting, implementation, and identification of resource requirements for network systems (including wireless) of moderate complexity. Participates in network planning, network architecture design and engineering. Integrates and schematically depicts communication architectures, topologies, hardware, software, transmission and signaling links and protocols into complete network configurations. Evaluates new products, performs network problem resolution and assists in the development and documentation of technical standards and interface applications. Monitors protocol compatibility, performs system tuning and makes recommendations for improvement.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in infrastructure/network environments performing network engineering (hardware and/or software), design, planning and implementation.

##### **Complexity:**

Intermediate professional level role. Works on projects/ systems/issues of medium to high complexity surrounding network planning, configuration and optimization. Works on one or more projects as a project team member, occasionally as a project team lead. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Network Analyst**

**Job#: 2440**

##### **General Characteristics**

Responsible for designing, installing and troubleshooting network systems (including wireless) to meet the functional objectives of the business. Involved with the configuration and maintenance of physical and logical network components. Assists in the design of the network architecture, designs the network infrastructure, and plans and designs LAN/WAN/wireless solutions. Performs capacity and resource planning, assessing network risks and contingency planning. Responsible for the implementation and maintenance of network management software; researching, analyzing and implementing software patches or hardware changes to fix any network deficiencies. Provides Tier 2 support. Involved in the evaluation of new products and services, may manage vendor service level agreements.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in infrastructure/network environments in network design, implementation, administration and support.

###### **Complexity:**

Intermediate professional level role. Works on projects/systems/issues of medium to high complexity. Provides support in designing, implementing, supporting and maintaining network systems. Works on one or more projects as a project team member, occasionally as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Network Administrator**

**Job#: 2450**

##### **General Characteristics**

Monitors, troubleshoots and maintains network (LAN, WAN and wireless) multiplexers, hubs and routers, and uses remote monitoring tools. The duties of this position can be broad and may include such tasks as installing new workstations and other devices, adding and removing individuals from the list of authorized users, archiving files, overseeing password protection and other security measures, monitoring usage of shared resources, and handling malfunctioning equipment. Selects, develops, integrates and implements network management applications for Internet components.

##### **Dimensions**

###### **Education:**

Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in infrastructure/network environments in network operations, support, maintenance and administration.

###### **Complexity:**

Intermediate professional level role. Works on projects/systems/issues of medium to high complexity. Provides daily operations support, maintenance and administration for network systems. Works on one or more projects as a project team member, occasionally as a project leader. May coach more junior technical staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: NETWORK MANAGEMENT

**Job Title: Network Technician**

**Job#: 2460**

**General Characteristics**

Provides daily operations support and maintenance for network systems (including wireless). Proactively monitors networks to provide stable, dependable network services across multiple platforms. Configures and troubleshoots computer networks. Maintains LAN/WAN/wireless operations by working with network facility and hardware/software vendors to ensure timely problem resolution. Maintains and utilizes network management applications to identify network faults, to ensure the provision of data or other telecommunications access to customers, and the movement of information from one location to the other.

**Dimensions**

**Education:**

Associate's or Bachelor's Degree, or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 1 year of IT work experience in infrastructure/network environments.

**Complexity:**

Learner/entry level role. Works on projects/systems/issues of small to medium complexity. Provides daily operations support and maintenance for network systems. Works on one project at a time as a project team member. Functions, somewhat independently, under general direction of senior technicians/engineers, supervisors or managers. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Manager, Internet Operations**

**Job#: 2600**

**General Characteristics**

Responsible for the development, release, and maintenance of Internet, Intranet, and Extranet systems and services supporting a wide range of content. Works with key business leaders and other IT groups to prioritize projects, maximize the effectiveness of Internet technologies in supporting the business strategy, improving communications, and enabling greater access to information. Ensures the coordination of all Internet and Web development activities, ensuring integration with other technologies utilized in the enterprise and continuity across applications. Develops standards for Internet and Web project initiation, design, development, and support. Key challenge of this position is in managing and prioritizing the numerous requests by the business, and influencing and coordinating the development of Internet based technologies occurring in areas outside of IT.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT and business work experience including managing team(s) responsible for development, implementation and maintenance of systems across multiple platforms. Experience with online relational database management systems, multimedia, Web applications development and testing.

**Breadth:**

Middle level management in Web systems and services operations and management functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a Chief Technology Officer, IT Chief Operating Officer, E-Business Executive or Departmental IT Executive.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS****Job Title: Internet/Web Architect****Job#: 2610****General Characteristics**

Responsible for gathering business requirements and translating them into Internet/Web architecture to achieve business objectives. Analyzes assigned specifications, planning, designing, and developing solutions, utilizing appropriate Internet/Intranet/Extranet architecture processes supporting a wide range of content—either individually or in concert with project team members. Provides appropriate documentation for object design decisions, estimating assumptions, applets, and performance metrics—as required by organization architecture process standards, or as assigned. Responsible for minimizing the issues between the client and the server applications and for the overall set-up and design of the Internet and Web server architecture. Impact and complexity of this job increases if organization is utilizing Internet solutions (vs. only Intranet), especially those with significant business impact (e.g., e-business).

**Dimensions****Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 5 years of IT work experience with demonstrated knowledge in architecture design, software development, database management systems and systems integration in multi-platform environments.

**Complexity:**

Advanced professional level role. Defines Web architectures and design for the enterprise. Works on multiple projects as a project leader or frequently as the subject matter expert. Works on projects/issues of medium to high complexity that require demonstrated knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Internet/Web Engineer**

**Job#: 2620**

**General Characteristics**

Integrally involved in the development and support of all Internet/Intranet/Extranet sites and supporting systems. Works closely with other IT groups and customers to define the system design and user interface based on customer needs and objectives. Participates in all phases of the development and implementation process, and may act as a project manager on special projects. Ensures the integration of the Web servers and all other supporting systems. Responsible for system tuning, optimization of information/data processing, maintenance and support of the production environment.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 4 years of IT work experience in systems analysis, development and engineering in an online environment.

**Complexity:**

Intermediate professional level role. Develops solutions requiring analysis and research. Works on small to large, complex projects that require increased skill in multiple technical environments and possesses knowledge in a specific business area. Works on one or more projects as a project team member or occasionally as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Web Applications Programmer**

**Job#: 2630**

##### **General Characteristics**

Develops, maintains, and supports applications for the organization's Internet/Intranet sites. Gathers and analyzes requirements. Programs all or selected components of Web applications. Documents components and applications. Develops automation techniques to enable end-user content publishing; programs, tests and implements mapped graphic images, forms and HTML pages; handles client browser support inquiries; maintains links to external sites and accuracy on internal links while ensuring up-to-date information. Researches, evaluates and recommends new Internet tools and applications for use in assigned responsibilities. The senior level Web Applications Programmer has experience in a variety of the more difficult Web tools and languages.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in software development, installation and modification in an online environment.

###### **Complexity:**

Intermediate professional level role. Develops solutions requiring analysis and research. Works on small to large, complex projects that require increased skill in multiple technical environments and possesses knowledge in a specific business area. Works on one or more projects as a project team member or occasionally as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Web Designer**

**Job#: 2640**

##### **General Characteristics**

Responsible for the design, development and creation of user-centered designs for Web sites. Responsibilities include human factors engineering, heuristic evaluations and usability testing for Web and client based applications as well as metrics setting and monitoring for assessing the usability of the Web application. Works to improve the usability, usefulness, and desirability of Web sites in collaboration with Graphic Designers, Product Managers, Engineering Staff and other Web Designers. Must be able to perform usability tests, provide design prototypes and provide ad hoc user interface consulting.

Responsible for requirements gathering and articulation of user interface issues—including development of page/site prototypes. Must be knowledgeable of user-centered design methodology, user scenarios, usability testing, storyboarding, paper and interactive prototypes.

Must have demonstrated skills in graphic applications, HTML development tools and other applicable authoring tools, Web production, front-end development using programming and scripting languages. Must be able to integrate design into program rules and system architecture and create innovative approaches to improving the end-user experience. Must be familiar with platform/browser compatibility and basic usability issues.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Graphic Design, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of combined IT and graphic design experience. Able to understand HTML and strong working knowledge of Web generators and photographic libraries. Possesses a portfolio of Web sites or solutions.

###### **Complexity:**

Intermediate professional level role. Works on moderately complex, to complex projects that require a solid understanding of Web design and layout. Works on multiple projects as a team member and sometimes as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Webmaster**

**Job#: 2650**

##### **General Characteristics**

Accountable for the design, upgrading, enhancement, maintenance, availability and effectiveness of technical functionality and content for one or more Web sites of the enterprise. Coordinates the publishing of Web site content, user interface, look/feel and level of specificity to suit a wide range of needs. Responsible for working closely with marketing and systems teams to coordinate content, developing on-going site structure and updates. Knowledge and experience in HTML, including style sheets, templates, complex tables, frames, image maps, CGI programming, applets, animation, multimedia design and delivery, and Web publishing procedures, is essential.

Primary focus is generally on gathering requirements that relate to the organization's business objectives relative to site audiences, and continuous content updates and site upgrades to enhance site hits/visits. Webmaster, in a junior role, would focus more extensively on programming content rather than the technical aspects of this position. Impact and complexity of this job increases if organization is utilizing Internet solutions (vs. only Intranet), especially those having significant business impact (e.g., e-business).

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 4 years of IT work experience. Experience in systems administration, Web graphic design, development and implementation experience using HTML, Perl and CGI languages.

###### **Complexity:**

Intermediate professional level role. Works on projects/systems/issues of medium to high complexity. Provides design, implementation, maintenance and administration support for Web systems and services. Works on one or more projects as a project team member, occasionally as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Internet/Web Systems Administrator**

**Job#: 2660**

**General Characteristics**

Responsible for ensuring the control, integrity, and accessibility of the Internet/Intranet for the enterprise. Responsible for change management procedures regarding the installation and testing of all upgrades and enhancements for the Internet/Intranet infrastructure. Responsible for proper initial installation as well as subsequent installations of updates/patches; preparation of system documentation; proactive, regular checks of system components for errors and application of necessary corrective action; set-up and maintenance of Web servers. Knowledgeable in all levels of Internet/Web security and the associated requirements for their application. Designs, develops and administers firewalls as a means of preventing unauthorized access to enterprise networks. Provides technical support to internal users and external customers; troubleshoots problems and takes corrective action on a timely, effective basis.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of IT work experience with Web-related software and hardware products, and systems administration experience with multi-platform environments.

**Complexity:**

Intermediate professional level role. Works on small to large, moderately complex Web sites. Works on multiple Web sites as a project team member, occasionally as a project leader. May coach more junior technical staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: INTERNET PLANNING, ENGINEERING AND OPERATIONS

**Job Title: Web Customer Support Specialist**

**Job#: 2670**

##### **General Characteristics**

Responsible for providing support services to users of Internet and Extranet sites. Provides technical advice and guidance relative to problems involving user interface, browser, hardware and supporting software. Troubleshoots and restores routine technical service and equipment troubles by analyzing, identifying and diagnosing faults and symptoms using established processes and procedures. Maintains a knowledge database and call tracking database to enhance quality of problem resolutions.

Coordinates efforts with the Help Desk to ensure all calls outside the customer environment are effectively resolved. Works in a team setting, sharing information and assisting others with calls. Provides input to Web development team for site improvements based on customer feedback. This job is very similar to an experienced Help Desk professional, with the added responsibility of interfacing directly with external customers to the business. As a result, customer service and technical competencies are very critical, as this may be the only "live" interface a customer has with the business.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years IT work experience in PC or client/server platform, network or systems administration in relevant computing environments.

###### **Complexity:**

Intermediate professional level role. Works on projects/systems/issues of medium to high complexity. Provides internal and external customer support for Web systems and services. Works on one or more projects as a project team member, occasionally as a project leader. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Director, Data Center Operations**

**Job#: 2800**

#### **General Characteristics**

Responsible for the overall enterprise-wide effectiveness and efficiency of data center technology systems and networks and in ensuring high levels of customer satisfaction are maintained. Leads the migration to new technologies, evaluates processing performance relating to machine utilization and reliability, and forecasts financial, physical, and human resource needs to meet established objectives. Oversees and coordinates network/data operations, business continuance and restoration plans that isolate problems and implement pre-planned alternative routes or systems to restore service.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 10 years of IT and business industry work experience, with at least 3 years of leadership experience in managing multiple, large, cross-functional teams or projects, and influencing senior level management and key stakeholders. Experience in the areas such as network, database administration, computer operations and production support.

##### **Breadth:**

Senior level management in data center operations and management functions. Has overall responsibility for department decisions and management. Provides strategic direction, coaches and mentors more junior management staff. Accountable for IT functional/departmental results. Frequently reports to a Chief Information Officer or IT Chief Operating Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Manager, Computer Operations**

**Job#: 2810**

#### **General Characteristics**

Responsible for the activities in the areas of production, data control, operations, and operations support. Develops and implements standards, procedures and processes for the operations group. Plans and manages the support of new technologies, data center performance and reliability. Defines and negotiates service level agreements. Oversees and coordinates the daily activities of the operations center. Provides input and recommendations regarding business continuance issues and improvements to the operations of systems and processes supported.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 more years of IT work experience including managing team(s) responsible for production and operations support.

##### **Breadth:**

Middle level management in data center operations. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer, Director, Data Center Operations or Operating Unit IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Supervisor, Computer Operations**

**Job#: 2820**

#### **General Characteristics**

Supervises the computer operations within the data center. Responsible for the day-to-day assignments of staff, and the follow-up of their work performance. Manages the daily activities to resolve problems and change management issues. Responsible for production systems' online response time. Maintains system availability, prepares metrics to evaluate systems performance, and works with IT groups and users to ensure that service objectives are met.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 5 years of IT work experience in computer operations with exposure to multi-platform environments. Requires experience in leading teams and projects.

##### **Breadth:**

First level management in data center operations. Works under general direction of middle level management. Manages multiple processes within the operations area. Manages and mentors technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Computer Operator**

**Job#: 2830**

#### **General Characteristics**

Responsible for monitoring multi-technology computing platforms including midrange platforms, mainframes and/or servers. Responsible for ensuring a stable operating environment and attaining maximum utilization of system facilities. Operates and monitors console systems and peripheral equipment such as printers, disk drives and tape readers. Troubleshoots and restores routine technical service and peripheral equipment, schedules production runs, performs system backup process, disaster recovery tests, loads tapes, disks and paper as needed. Assists programmers and systems analysts in running jobs that are used for testing and debugging new programs.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 1 year of IT work experience.

##### **Complexity:**

Learner/entry level role. Supports systems on a single platform. Works on one project as a team member and assists with special projects. Functions, somewhat independently, under direction of senior operators, supervisors or managers. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Manager, Capacity Planning**

**Job#: 2840**

#### **General Characteristics**

Develops, manages and forecasts capacity requirements based on business needs and IT infrastructure growth capacity. Facilitates the development of policies to ensure that existing capacity is being used as efficiently as possible. Ensures data recovery, maintenance, data integrity and space requirements are met across a variety of platforms. Ensures that capacity workload modeling and availability analysis is performed for a variety of platforms and large environments. Serves as an expert resource to IT groups in planning the resource requirements for systems under development. Presents statistical availability and trend analysis and recommendations to IT management, IT leadership, and the business, as needed. Ensures reliability and availability of platforms to meet business objectives.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for infrastructure/operations support in multi-platform environments.

##### **Breadth:**

Middle level management in operations and management functions. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer, Director, Data Center Operations or Operating Unit IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Manager, Production Support**

**Job#: 2850**

#### **General Characteristics**

Manages the daily operations of the Production Support group. Develops and implements policies and procedures for the production support function which includes operator training and development, data center scheduling, installation and re-start and recovery procedures. Monitors and reports all production outages. Performs proactive analysis on all factors impacting high availability and service level attainment. Requires interaction with appropriate IT and business unit personnel. This position requires in-depth knowledge of computer operations, monitoring and control, systems recovery and production processing control.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for production and operations support.

##### **Breadth:**

Middle level management in data center operations. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer, Director, Data Center Operations or Operating Unit IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: OPERATIONS

**Job Title: Production Support Analyst**

**Job#: 2860**

#### **General Characteristics**

Manages and controls the processing of programs and peripheral equipment on mainframe and/or distributed computer systems to ensure the highest levels of service and system availability are attained. Establishes production runs, ensuring that appropriate job control language, run documentation and data files are available. Assists in job set-up. Performs problem identification, escalation and resolution. Communicates status of operations to allow for immediate response to service disruptions.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or a related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in production and operations support.

##### **Complexity:**

Intermediate professional level role. Provides production support on multiple platforms. Works on multiple projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TELECOMMUNICATIONS

**Job Title: Manager, Telecommunications Operations**

**Job#: 3000**

##### **General Characteristics**

Manages the operations, daily planning, engineering, design, and resource allocation for the enterprise's telecommunications functions. Ensures customer satisfaction through quality standards and measures by evaluating the performance of telecommunications networks and related interfaces. Responsible for strategic telecommunications planning and works with senior IT leadership to coordinate telecommunication plans with those of the business. Develops and implements standards, procedures, and processes for the telecommunications group. Plans and manages the support of new technologies, performance and reliability. Defines and negotiates service level agreements. Oversees and coordinates the daily activities of the operations center. Performs a coordination role with enterprise management, vendors and customers.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for infrastructure/network/telecommunications operations and support in multi-platform environments.

###### **Breadth:**

Middle level management in telecommunications operations. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer, Operating Unit IT Executive or Departmental IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TELECOMMUNICATIONS

**Job Title: Telecommunications Engineer**

**Job#: 3010**

##### **General Characteristics**

Responsible for engineering and/or analytical tasks and activities associated with areas within the telecommunications function (e.g., network design, engineering, implementation, diagnostics or operations/user support). Monitors the operation of telecom network systems. Performs complex tasks relating to telecom network operations, installation, and/or maintenance for local, off-site and/or remote locations.

The scope of responsibility for this position includes, but is not limited to, the configuration, deployment, testing, maintenance, monitoring and trouble-shooting of telecommunications network components to provide a secure, high performance network. Duties also entail quality assurance and testing of transmission mediums and infrastructure components.

Serves as technical specialist/lead on a functional basis, for the resolution of complex network problems. Experience should include: moves, adds and changes, fault isolation and resolution, and end-user support. Requires broad knowledge of telecom systems, dial plans, switching architecture, telephony and wiring.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in telecommunications and multi-platform environments.

###### **Complexity:**

Intermediate professional level role. Provides technical support and maintenance for existing and new telecommunications services. Works on moderate to complex projects as a team member. May lead team and coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TELECOMMUNICATIONS

**Job Title: Telecommunications Technician**

**Job#: 3020**

##### **General Characteristics**

Under direct supervision, monitors, operates, installs and maintains telecommunications systems and equipment in addition to troubleshooting any type of hardware or software problems to ensure that systems perform in a manner which best meets business needs and objectives. Responsible for the installation, maintenance and repair of telecommunications equipment. Assists in the installation of telecom systems and equipment for new company facilities. Performs telecom network software installations and maintenance of network database for system maintenance and billing support.

Possesses knowledge of data scopes, patch panels, modems and various analog and digital signaling systems. Must demonstrate thorough knowledge of T-1 network architecture and operating procedures. Knowledge of line control techniques and communication access methodology is needed. Must be able to read engineering drawings and terminate cables and grounding systems.

##### **Dimensions**

**Education:**

Associate's or Bachelor's Degree, or technical institute degree/certificate in Computer Science, Information Systems or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 1 year of IT work experience with basic understanding of telecommunications and multi-platform environments.

##### **Complexity:**

Learner/entry level role. Provides technical support and maintenance for existing telecommunications services. Works on low to moderately complex projects as a team member. Functions, relatively independently, under direction of senior professionals, supervisors or managers. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ELECTRONIC COMMERCE

**Job Title: Director, Electronic Commerce**

**Job#: 3200**

##### **General Characteristics**

Responsible for creation, implementation and management of the enterprise's systems in support of business e-commerce. Collaborates with business leadership in the development of an e-commerce strategy and in the prioritization of development work. Must understand business processes. Ensures integration of Internet/Extranet systems architecture with existing enterprise architecture. Develops and implements e-commerce service concepts including: pricing, packaging, product offerings and lifecycle management. Develops site transaction and partnership strategy. Works with appropriate senior management to analyze customer feedback, develop promotional plans, and target marketing for product and service concepts.

Possesses overall project management responsibility for all e-commerce development work. Responsible for the integration of the Web site with Product Development, Customer Service and Sales organizations. Manages content creation, input from other marketing groups and editorial calendar. Identifies and manages technology development partners and outside vendors. Maintains currency of new technology and evaluates opportunities for improvement. May manage a team of product managers and content editors.

##### **Dimensions**

**Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 10 years of IT (including Web/Internet, database applications and data warehousing) and business/industry work experience, with at least 3 years of leadership experience in managing multiple, large, cross-functional teams or project, and influencing senior level management and key stakeholders.

##### **Breadth:**

Senior level management. Oversees strategic planning and development of e-commerce solutions in partnership with technical and business leadership. Provides technical and e-business leadership for the enterprise. Accountable for enterprise-wide results. Frequently reports to a Chief Information Officer, Chief Technology Officer or E-Business Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ELECTRONIC COMMERCE

**Job Title: Manager, Electronic Commerce**

**Job#: 3210**

#### **General Characteristics**

Partners with business units to develop creative solutions using e-commerce technology that will enhance the enterprise's competitive advantage. Directs the implementation of e-Commerce services and businesses for the enterprise or specific business units. Responsible for the daily management of e-Commerce activities and staff. Possesses professional experience and knowledge in a variety of net-centric computing architectures and technologies. Possesses an operational knowledge of key business processes and understands the technology either utilized or needed for their operation. Strong Project Management expertise is essential.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for Web/Internet, database applications and data warehousing functions.

##### **Breadth:**

Middle level management in the e-commerce function. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an E-Business Executive or Director, Electronic Commerce.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ELECTRONIC COMMERCE

**Job Title: Electronic Commerce Analyst**

**Job#: 3220**

#### **General Characteristics**

Responsible for the analysis, development, maintenance and support of e-commerce software programs to ensure the needs of the business community are appropriately addressed. Works closely with vendors and trading partners. Duties include the creation and trading of partner profiles, mapping of transactions, establishment of communication links with trading partners and the testing of secure transaction maps and communication links to ensure security, proper identification and capture of required data. Identifies and documents programming requirements for all new transactions. Assists in the development and documentation of policies and procedures for the e-Commerce function.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in software development, installation and maintenance, Web/Internet, database applications and/or data warehousing.

##### **Complexity:**

Intermediate professional level role. Provides programs development, maintenance and support on multiple platforms for the e-commerce function. Works on multiple projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ELECTRONIC COMMERCE

**Job Title: EDI Specialist**

**Job#: 3230**

##### **General Characteristics**

Provides technical expertise and support for Electronic Data Interchange (EDI), and other Business-to-Business communications. Analyzes and develops the EDI interface. Participates in systems design and quality assurance activities. Supports the user community and creates and maintains partner relationships with customers and vendors. Responsible for developing EDI mapping specifications and documentation. Duties include testing, implementing and maintaining EDI transactions, developing and maintaining trading partner definitions including relevant translation objects utilizing EDI translation software tools.

Handles communications with trading partners for EDI transaction set-up and ongoing maintenance. Coordinates between trading partners and networks to ensure mapping compliance. Tests and resolves incoming EDI file problems. Develops new business opportunities utilizing EDI.

Resolves technical mapping variations or gaps and first-level troubleshooting issues in production environment. Develops guidelines, checklists, procedures and training documentation. Often involved with a variety of client/server platforms.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years IT or related work experience in e-commerce, network, telecommunications engineering and support in multi-platform environments.

###### **Complexity:**

Intermediate professional level role. Provides EDI programs development, maintenance and support on multiple platforms for the e-commerce function. Works on multiple projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Director, Data Warehouse**

**Job#: 3400**

##### **General Characteristics**

Responsible for the overall architecture, design, development, and maintenance of data warehousing and data mart systems and services for the entire enterprise's business function. Works closely with customers from a strategic perspective to identify and maximize opportunities to utilize data marts and/or data warehouse systems to improve business processes, promote the strategic use of information technology, and enable the work force to use technologies as a competitive tool. Ensures the development of enterprise-wide standards for the Data Warehouse to ensure compatibility and integration of multi-vendor platforms. Responsible for organizational balance and system coherency between front-end desktop/client environment and Data Warehouse back-end processing functions. Provides corporate leadership, vision, and direction for data warehouse systems, in support of the enterprise's business objectives and requirements.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 10 years of IT and business/industry work experience, with at least 3 years of leadership experience in managing multiple, large, cross-function teams and projects, and influencing senior level management and key stakeholders. Experience in strategic planning, development, implementation and maintenance of large-scale integrated relational database systems.

###### **Breadth:**

Senior level management. Oversees strategic planning and development of data warehouse solutions in partnership with technical and business leadership. Accountable for enterprise-wide results. Frequently reports to a Chief Information Officer or Chief Technology Officer.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Manager, Data Warehouse**

**Job#: 3410**

##### **General Characteristics**

Works with the business and senior IT leadership to identify and establish information requirements, develop and implement data warehouse strategies that utilize data marts and/or data warehouse systems to enhance business processes and manage business intelligence. Leads the activities of data warehouse project teams in the design, development and implementation of data warehouses; and the configuration and auditing of data warehouses to ensure quality control of data.

Responsible for overseeing the development, operations and maintenance of data warehouse environment, including organizational balance and system coherency between front-end desktop/client environment and data warehouse back-end processing functions. Provides guidance regarding the use of data warehouse system, capability of systems to deliver information, and subject matter expertise regarding current systems and emerging technology. Needed knowledge includes process and data modeling, data architectural development methodology, project management and extensive knowledge of data warehouses and data marts.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for systems/applications development, database management systems and data warehouse development and management.

###### **Breadth:**

Middle level management in the data warehouse function. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a Director, Data Warehouse or Director, Systems and Programming.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Business Intelligence Architect**

**Job#: 3420**

##### **General Characteristics**

Responsible for leading the design and support of enterprise-wide business intelligence applications and architecture. Works with enterprise-wide business and IT senior management to understand and prioritize data and information requirements. Solves complex technical problems. Optimizes the performance of enterprise business intelligence tools by defining data to filter and index that add value to the user. Creates testing methodology and criteria. Designs and coordinates a curriculum for coaching and training customers in the use of business intelligence tools to enhance business decision-making capability. Develops standards, policies and procedures for the form, structure and attributes of the business intelligence tools and systems. Develops data/information quality metrics. Researches new technology and develops business cases to support enterprise-wide business intelligence solutions.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of experience with large and complex database management systems, business intelligence tools and systems.

###### **Complexity:**

Expert/lead technical role. Provides technical expertise and direction for the development of complex enterprise-wide business intelligence and decision support systems solutions. Works on multiple projects as a project leader or sometimes as a business subject matter expert. Works on highly complex projects that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Data Warehouse Analyst**

**Job#: 3430**

##### **General Characteristics**

Responsible for gathering and assessing business information needs and preparing system requirements. Performs analyses, development and evaluation of data mining in a data warehouse environment which includes data design, database architecture, metadata and repository creation. Uses data mining and data analysis tools. Reviews and validates data loaded into the data warehouse for accuracy. Interacts with user community to produce reporting requirements. Provides technical consulting to users of the various data warehouses and advises users on conflicts and inappropriate data usage.

Responsible for prototyping solutions, preparing test scripts, and conducting tests and for data replication, extraction, loading, cleansing, and data modeling for data warehouses. Maintains knowledge of software tools, languages, scripts, and shells that effectively support the data warehouse environment in different operating system environments. Possesses working knowledge of Relational Database Management Systems (RDBMS) and data warehouse front-end tools. Must have an extensive knowledge of data warehouse and data mart concepts.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in business intelligence tools and systems.

###### **Complexity:**

Intermediate professional level role. Provides data warehouse architectural design, development and support in multi-platform environments. Works on multiple projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Data Warehouse Administrator**

**Job#: 3440**

**General Characteristics**

Provides data warehouse support functions including database maintenance, development and enhancement. Performs database administration functions such as loading data into database from external sources, supports users in constructing queries and generating output files. Responsible for on-going design and performance enhancement, which include reviewing queries for performance issues, estimating, monitoring and tuning the warehouse as it operates. Develops and administers processes to ensure interoperability and security of data warehouse system. Must possess a strong understanding of source data, data modeling, and data repository requirements.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of IT work experience in business intelligence tools and systems.

**Complexity:**

Intermediate professional level role. Provides daily administration, maintenance and support of data warehouse applications in multi-platform environments. Works on multiple projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT****Job Title: Manager, Decision Support****Job#: 3600****General Characteristics**

Acts as liaison between business and IT leadership regarding the identification of business critical information and knowledge (e.g., customer and market data), and its usage and availability. Manages the Decision Support staff to ensure that the Decision Support Systems (DSS) and Executive Information Systems (EIS) are built to meet the information needs of the business leaders and various business units. Has full understanding of corporate strategies and must manage the diversity of needs and prioritize those needs based on the overall business strategy of the organization.

Works closely with key business leaders to define critical information needs, providing guidance regarding availability of data, capability of systems to deliver information needs, and subject matter expertise regarding current systems and emerging technology. Leads the research, evaluation and selection of new technologies. Leads cost and feasibility studies. Ensures project management process is in place, provides resource management and ensures quality and timely solutions. Needed knowledge includes process and data modeling, data architectural development methodology, IT planning methodology, consulting and facilitation, project management and extensive knowledge of the enterprise's data and decision-making processes.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for database, data warehouse, decision support systems and executive information systems development, support and administration.

**Breadth:**

Middle level management in the data warehouse function. Works under general direction of senior level management. Typically manages and mentors supervisors, project leaders and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a Director, Data Warehouse or Director, Systems and Programming.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Decision Support Specialist**

**Job#: 3610**

##### **General Characteristics**

Works closely with customers and design teams in prioritizing data and information requirements. Determines how Decision Support Systems (DSS) and Executive Information Systems (EIS) will provide the information required to make effective business decisions; translates requirements into applications that employ appropriate decision support and reporting tools. Involved in the design, development and maintenance of DSS. Performs modeling of data sources and flows, works with data management staff to define an operational framework that will define, develop and implement DSS, EIS, policies and security frameworks to ensure precise and secure delivery of knowledge and information. Monitors system performance, implements changes to optimize performance. Involved in the selection of new products. Needed skills and knowledge includes process and data modeling, DSS architecture and tools, development life cycle methodologies, IT planning methodology, extensive knowledge of the enterprise's data and decision-making processes.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of IT work experience in business intelligence tools and systems.

###### **Complexity:**

Intermediate professional level role. Provides support for user community and development team in design, development and maintenance of DSS and/or EIS applications. Works on multiple function tasks that tend to be of medium technological complexity. Identifies and recommends technology solutions. Works one or more projects as a team member and may lead projects of moderate complexity. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Decision Support Administrator**

**Job#: 3620**

##### **General Characteristics**

Supports the user community in the use of business intelligence tools to query files and databases for report outputs. Assists customers in use of OLAP tools, extracts and collects data for performing queries and writing reports. Reviews queries for performance issues, making changes as needed. Participates in the design and development of the system, as well as creation of user documentation. Monitors customer usage, upgrades enterprise-wide OLAP query and reporting tools, monitors batch queries and ensures interoperability and security of various front-end components. Maintains meta data coordination, and supports production system. Needed knowledge includes process and data modeling and data architectural development methodologies.

##### **Dimensions**

###### **Education:**

Associate's or Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 1 year IT work experience in business intelligence tools and systems.

###### **Complexity:**

Learner/entry level role. Provides support for user community. Works on multiple function tasks that tend to be of low technological complexity. Works on one or more projects as a project team member. Functions, relatively independent, under direction of senior professionals, supervisors, or managers. Generally follows documented procedures and checklists.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT****Job Title: Manager, CRM Technology****Job#: 3800****General Characteristics**

Responsible for leading a team in analyzing and determining business requirements and managing the planning and execution of Customer Relationship Management (CRM) technology and associated programs to achieve business objectives of enhancing customer satisfaction, optimizing profitability and developing long-term customer loyalty. Acts as a liaison between the IT and business communities in developing and implementing CRM solutions, manages the business impact of all CRM projects. Oversees the development and improvement of the technology framework that supports the integration of enterprise customer response process through various customer services channels (e.g., mail, email, Web, call center). Partners with Sales, Marketing and the business community to develop CRM strategies and support the development and execution of customer campaigns and promotions by mining the enterprise CRM database. Works closely with data management, infrastructure and development groups to ensure required data and systems are in place to meet the enterprise's CRM needs. Leads the research, evaluation and selection of CRM technologies. Possesses a thorough understanding of data architectural development methodology, process and data modeling, Web and call center technologies for CRM solutions. Has working knowledge of database marketing methodologies and processes, including but are not limited to channel and segment marketing, direct marketing and online marketing. Strong project management skills in planning and monitoring projects in a cross-functional environment.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for data warehousing, decision support systems or marketing support information systems.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Responsible for leading a team of analysts and developers performing work in designing, developing and maintaining CRM systems and applications. Frequently reports to a Chief Technology Officer, Director, Data Warehouse or Director, Systems and Programming.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS INTELLIGENCE SYSTEMS MANAGEMENT

**Job Title: Knowledge Engineer**

**Job#: 4000**

##### **General Characteristics**

Responsible for developing an infrastructure and process to capture knowledge gained by the organization through successful system interventions and enabling its shared use. Oversees the identification of critical knowledge, its usage, availability and the needs of various business groups. Involved in modeling information sources, flows and critical paths, as well as understanding how information is turned into knowledge and the relationship of knowledge and how it supports and enables key business processes. Facilitates the development of supporting knowledge architecture and standards. Works with operations staff to define an operational framework that defines, develops and implements delivery systems, systems management, policies and security frameworks to ensure delivery of knowledge and information to appropriate groups.

Possesses expertise in process and data modeling, architectural development methodologies, IT planning methodologies and extensive knowledge of the enterprise's business and decision-making processes. Must possess strong leadership skills to gain credibility with various business leaders and stakeholders. Makes complex IT and business decisions. Works with other IT groups to ensure solid cross-functional decisions are made as a team.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT and business/industry work experience. Experience with document management, groupware, relational database systems, data warehouse and data mining, Web and systems analysis/development.

###### **Complexity:**

Expert/lead technical role. Develops infrastructure and process for identifying and sharing enterprise's core technical and business knowledge. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require demonstrated knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)****Job Title: ERP Team Lead****Job#: 4200****General Characteristics**

Accountable for providing overall direction and integration for a specific ERP module, functional and/or business area. Understands the business strategy of a particular function/area and works with the team to define business requirements. Communicates and coordinates with other Team Leads, business leadership, and Project Manager to ensure appropriate integration of processes and modules across the enterprise. Oversees, defines and monitors critical path activities and resolves issues or escalates issues to the Project Manager as needed. Drives the design and implementation of new business processes with organizational structure and required ERP configuration.

Must possess an in-depth understanding of the business function/process supported, and also be viewed as a credible representative of that business function/process. Successful implementation is dependent on the ability of the incumbent to influence business leadership and management decisions and drive ownership and acceptance of changes to the business.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT and business work experience including managing team(s) responsible for systems implementation and/or infrastructure support. Often is recruited internally from high-level management positions in the organization.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Degree of integration driven by ERP requires a consensus decision making process across Team Leads. Once key decisions are made, Team Lead then has autonomy for the technical decisions to support the business, but business process decisions are made through constant education and negotiation with business leadership and management. Works on complex business issues, which have a significant impact to the enterprise and across enterprise processes and functions due to the integration of ERP. Frequently reports to a Chief Technology Officer, Competency Center Leader or Departmental IT Executive.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: ERP Team Member**

**Job#: 4210**

#### **General Characteristics**

Responsible for documenting the “to-be” processes, defining performance metrics and identifying and resolving process gaps. Has a strong understanding and experience in the ERP methodology used by the organization. Responsible for mapping the business processes to ERP modules (often in conjunction with consultants) and participates in user acceptance testing. Often is involved in the creation of documentation and training materials, and may deliver training during implementation. May also act in a system support role immediately after implementation. Incumbents in this position come from the business, with an expert level of understanding of all of the business processes of the function they represent. They also serve as a communications liaison to the business during the implementation.

#### **Dimensions**

##### **Education:**

Bachelor’s Degree in function represented in the business. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of business and/or ERP implementation experience.

##### **Complexity:**

Intermediate professional level role. Works on multiple projects as a project team member, occasionally as a technical leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: ERP Configurer**

**Job#: 4220**

**General Characteristics**

Performs functional analysis, requirements, definition and ERP module configuration and testing. Responsible for conducting prototypes, developing functional specifications, data mapping, function mapping, setting of configuration tables and setting of transaction/control tables. Has a thorough understanding of the business processes and flows to enable the analysis of business requirements and the development of solutions for the business functions. Responsible for the identification of and resolution of gaps in the business processes. Involved in security/authorization set-up, user documentation, data interface design, data migration and reconciliation. May be involved in the installation and tuning of modification, as well as archiving data. Generally this position has light programming skills in the appropriate language to develop necessary “work arounds.”

**Dimensions**

**Education:**

Bachelor’s Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of IT work experience in systems/applications development or support functions.

**Complexity:**

Intermediate professional level role. Provides support for the user community and development team in the design, development, configuration and testing of ERP modules. Works on multiple functional tasks that tend to be of medium technological complexity. Identifies and recommends functional and technological solutions. Works on one or more projects as a team member. Acts as a subject matter expert for one ERP functional area. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: ERP Programmer/Analyst**

**Job#: 4230**

**Scope Variant**

Maps to level B

**General Characteristics**

Applies system solutions to business problems through the design and programming of automated systems. Configures, analyzes, designs, develops, and maintains ERP program codes and applications to support business processes and functions. Works on elements of large, complex installations. Performs all aspects of programming assignments and assists with systems design. Fully knowledgeable in ERP programming languages. Applies knowledge and experience with technology and application development methodologies to perform basic systems analysis techniques, testing, debugging, file design and storage.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of IT work experience in programming and/or ERP systems analysis. Requires advanced programming techniques and software design. May require knowledge of ERP applications or objectoriented analysis and design.

**Complexity:**

Intermediate professional level role. Works on multiple projects as a project team member, occasionally as a technical leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: ERP Systems Support Specialist**

**Job#: 4240**

#### **General Characteristics**

Serves as single point-of-contact for end-users after Power Users have assisted end-users. Performs problem identification and on-the-spot training to prevent problem reoccurrence and knowledge transfer. Escalates Tier 2 problems to appropriate support (e.g., technical experts or process experts). Maintains history reports, identifies and addresses re-occurring problems, and assists in the development and execution of ERP and business process best practices across the organization. Performs basic fixes and data maintenance. May develop on-line help and update systems support help scripts. This position is very similar in responsibilities and tasks to a help desk position, but the impact to the organization due to errors is more significant. This position requires more advanced training than a similar help desk position.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of business and/or ERP experience.

##### **Complexity:**

Intermediate professional level role. Works on multiple projects as a project team member, occasionally as a technical leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: ERP Systems Administrator**

**Job#: 4250**

##### **General Characteristics**

Responsible for ensuring the performance and reliability of ERP systems. Performs troubleshooting for hardware, software and system problems that involve ERP modules. Participates in projects to implement or enhance ERP systems and applications. Works with database administrator and ERP development team in defining user requirements, coordinating system-wide updates and installing upgrades and patches for ERP systems. Provides recommendations for enhancements/changes that may involve custom design, optional and third party products to improve the efficiency and effectiveness of ERP systems. Maintains ERP systems security through user profile management, creates and updates access permissions and maintains user accounts. Monitors and maintains performance metrics for system features, recommends and takes corrective/preventive actions. Participates in the design, development and implementation of test and production objects. Performs configuration, change management and testing activities as required. Consults users on technology changes that will impact work processes.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of business and/or ERP implementation experience. Experience with systems and database administration.

###### **Complexity:**

Intermediate professional level role. Works on multiple projects as a project team member, occasionally as a technical leader. Responsible for maintaining ERP systems and applications, supporting and training users for ERP system(s) and applications usage. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: ENTERPRISE RESOURCE PLANNING (ERP)

**Job Title: Basis/ALE Technical Consultant**

**Job#: 4600**

##### **General Characteristics**

Provides the highest level of technical expertise and consulting on SAP Basis or its successor, SAP Web Application Server systems to process teams and IT staff. Establishes the infrastructure standards and requirements. Evaluates, directs and supports SAP Basis and/or Web Application Server system enhancements and performs quality assurance functions. Researches and implements solutions for Basis and/or Web Application Server functionality in the areas of performance monitoring and tuning and systems configuration, design and implementation. Provides highest degree of technical engineering and support to the SAP team. Must have extensive experience in operating systems and programming languages, such as ABAP, Java and J2EE.

##### **Dimension**

###### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 5 years of IT work experience building enterprise applications, including a minimum of 2 years of experience with SAP systems.

###### **Complexity:**

Advanced professional level role. Works on multiple projects as a project leader or frequently as the subject matter expert. Works on projects/issues of medium to high complexity that require demonstrated knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Chief Sourcing Officer**

**Job#: 4800**

##### **General Characteristics**

Responsible for the development and implementation of an overall IT sourcing strategy in a multi-sourced IT environment. Acts as an integral part of the CIO's leadership team, works closely with other IT and business leaders to develop and execute the IT sourcing strategies and programs. Leads the IT Sourcing Office in evaluating and determining the most cost-effective and efficient means of sourcing, acquiring and delivering IT products and services. Responsible for making strategic decisions on what should be in-sourced and what should be outsourced based on the IT and business strategic direction. This role focuses on the sourcing at an enterprise level and is responsible for creating the governance mechanism that is necessary to continuously coordinate and integrate the teams of vendor relationship management, contract management and administration, IT project and asset management.

##### **Dimensions**

###### **Education:**

Bachelor's Degree or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 10 years of experience including managing large, multiple, cross-functional team(s) and project(s) and influencing senior management and key stakeholders. Experience with vendor relationship management, contract negotiation, contract administration, project or asset management in a technology environment.

###### **Breadth:**

Senior level management. Oversees strategic planning and development of sourcing strategies and programs in partnership with technical and business leadership. Accountable for enterprise-wide results. Frequently reports to a Chief Information Officer, Chief Technology Officer or IT Chief Operating Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Manager, IT Procurement**

**Job#: 4810**

##### **General Characteristics**

Recommends and establishes the IT procurement strategy, processes, and procedures that are consistent with corporate policy, IT project requirements and sound commercial, legal and ethical practices. Responsible for the systematic execution of processes and procedures for the timely and cost effective purchasing of IT products and services. Manages the activities of the IT procurement function, including the collection and execution of purchase orders, negotiation of bids from vendors, placement and tracking of purchase orders and coordination and reconciliation of invoices for processing. Manages the full cycle of all IT purchases, agreements and contracts from initiation to completion. Manages supplier relationships and service level administration for vendors. Acts as a liaison between IT and vendors in major dispute resolution concerning supplier performance. Evaluates supplier base for cost savings opportunities. Identifies and engages services of new suppliers in support of IT requirements.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Business Administration, Finance, Accounting, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of business experience including managing team(s) responsible for asset management, procurement, finance or other related functions.

###### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer, Chief Information Officer, Chief Financial Officer or Chief Sourcing Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: IT Procurement Specialist**

**Job#: 4820**

**General Characteristics**

Participates in the selection and implementation of IT supplier sourcing strategies to ensure high quality, on time delivery and cost competitiveness. Responsible for the collection and execution of purchase orders. Solicits, receives and analyzes proposals, quotations and tender submissions and recommends selection of suppliers in accordance with corporate policies and legal compliance. Tracks purchase orders and reconciles invoices in preparation for payment processing. Acts as a point of contact for IT in regards to vendor performance, including on-time delivery, quality of products and services acquired and problem resolution. Coordinates with Asset Management to ensure effective inventory management.

**Dimensions**

**Education:**

Bachelor's Degree in Business Administration, Finance, Accounting, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of business experience in asset management, procurement, finance or other related functions.

**Complexity:**

Intermediate professional level role. Works on multiple projects as a project team member, occasionally as a technical leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT****Job Title: Manager, Vendor Relationships****Job#: 5000****General Characteristics**

Develops and implements the strategic sourcing and vendor relationship strategies. Manages the selection, acquisition and monitoring of contractual agreements for hardware, software and IT services for the enterprise. Works closely with the business and IT to understand their needs and serves as the IT point of contact for all purchases, deliveries and problems with products and services. Articulates and negotiates service level agreements. Works with Asset Management to ensure appropriate use of corporate funds. Develops, or assists in the development of Request for Information (RFIs), Request for Proposal (RFPs) and business cases.

Qualifies vendors and maintains an approved vendor database and tracking system. Establishes standards and procedures for evaluating products and services. Serves as the primary interface between the service provider and the business. Maintains contact with vendors to manage the status and quality of orders and the progress toward contractual commitments. Provides status updates on purchases, escalates delivery problems as necessary to affect minimal impact to the operation. Follows up with IT management to ensure satisfaction with delivered products and services and addresses any problems or concerns.

Participates in the budget process, such as annual budget planning, providing cash flow for other departments, quarterly reconciliation and ad hoc expense reports. Continually seeks optimal value in service from vendors, reviewing and monitoring performance and return-on-investment metrics and initiating contract modifications. Pursues new vendor relationships as needed. Must have a basic understanding of all product and service needs, and must maintain knowledge of changing technologies.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of experience including managing team(s) responsible for vendor relationship management, contract negotiation, contract administration, project or asset management in a technology environment.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Develops strategic outsourcing strategy and plans, provides management direction to the team(s). Supports multiple contracts or complex enterprise agreements. Works on projects that range in size, complexity and contract duration. Frequently reports to a Chief Technology Officer, IT Chief Operating Officer, Chief Information Officer, Chief Financial Officer or Chief Sourcing Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Manager, Outsourcing Contracts**

**Job#: 5010**

##### **General Characteristics**

Responsible for all activities relating to the outsourcing contract management function. Leads contract efforts from contract signing, through vendor transition and current operational state. Establishes metrics, process and procedures and oversight management model required to ensure optimum vendor delivery, service, quality and pricing. Monitors vendor contracts to ensure terms and conditions are met; defines and manages vendor penalties/incentives if performance does not meet established criteria/exceeds established criteria.

Interprets the contract for the enterprise. Sets vendor directions and priorities. Creates, negotiates and incorporates contract amendments. Renegotiates contract, if required, to accommodate scope changes or changes in business requirements. Reviews vendor proposals and negotiates pricing/terms. Reviews vendor invoices for accuracy, and owns enterprise budget responsibility for the outsourcing expense. Serves as first point of negotiation for vendor disputes. Complexity of position can vary significantly depending on deal size/scope, single vs. multiple contract responsibility, and whether responsibility covers IT outsourcing contracts exclusively or all enterprise outsourcing contracts.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Business Administration, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of finance or contract management work experience including managing team(s), specifically within the IT area.

###### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Supports multiple contracts or complex enterprise agreements. Works on projects that range in size, complexity and contract duration. Frequently reports to a Chief Technology Officer, IT Chief Operating Officer, Chief Information Officer, Chief Financial Officer or Chief Sourcing Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Contracts Manager**

**Job#: 5020**

**General Characteristics**

Manages and controls the contractual relationship with service providers. Coordinates contract activities, including contract development, negotiation and transition. Monitors vendor contracts to ensure terms and conditions are met. Defines and manages vendor penalties and incentives, if performance does not meet or exceed established criteria. Creates, negotiates and incorporates contract amendments, renegotiating the contract, if required, to accommodate scope changes or changes in organization requirements. Reviews contract budget variances and takes corrective action as needed.

**Dimensions**

**Education:**

Bachelor's Degree in Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 4 years of finance or contract management experience.

**Complexity:**

Intermediate professional level role. Manages the entire contractual relationship with one or more IT service providers. Serves as a liaison between the IT service provider and the business. Supports multiple contracts or complex enterprise agreements. Works on projects that range in size, complexity and contract duration. May coordinate or manage the work of others.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Finance/Administration Specialist**

**Job#: 5040**

**General Characteristics**

Responsible for the financial administration practices and procedures associated with the management of vendor contracts. Reviews vendor charges, identifies disparities and resolves basic issues with the service provider. Monitors contract budget performance, identifying variances and recommending corrective actions. Allocates costs across the enterprise and performs regular audits to ensure contract compliance. Performs cost benefit analyses and supports Vendor Relationship Management team in developing the business cases necessary to gain approval for vendor-supplied services.

**Dimensions**

**Education:**

Associate's or Bachelor's Degree in Business Administration, Finance or other related field. Or equivalent work experience.

**Experience:**

A minimum of 2 years of financial management experience, preferably within the IT area.

**Complexity:**

Learner/entry level role. Provides financial management of one or more outsourcing projects. Represents either a business unit or enterprise initiative. Works on projects that range in size, complexity and contract duration. Functions, somewhat independently, under general direction of senior level professionals, supervisors or managers. Generally follows documented procedures and checklists.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SOURCING AND VENDOR RELATIONSHIP MANAGEMENT

**Job Title: Technical Advisor**

**Job#: 5200**

##### **General Characteristics**

In an outsourcing environment, works with service providers to ensure their in-scope technical solutions are consistent with enterprise's business strategy and architecture. Works closely with business unit performance managers and quality assurance staff to review service provider problems, to analyze and validate the accuracy of information and the feasibility of solutions. May troubleshoot performance issues and resolve problems with service providers. Tracks industry trends and maintains knowledge of new technologies in the area of expertise to better evaluate business unit service requests and service provider proposals. Keeps current on the participating business strategies and advises when solutions may or may not be leveraged across the enterprise. Understands the value of technology in the enterprise's business processes, works with service providers to identify opportunities for innovation, cost reduction and improved efficiencies and reviews service provider solutions. In addition, this role provides input into the in-scope technical architecture for outsourcing projects.

##### **Dimensions**

###### **Education:**

Bachelor's or Master's Degree in Business Administration, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT experience within one or more specialty areas. Has a deep level of understanding surrounding information systems, networking theory and architecture standards in areas of expertise.

###### **Complexity:**

Expert/lead technical role. Works on one or more projects as the subject matter expert or technical leader/consultant. When involved with a project team, acts in a consultative manner and typically does not provide administrative or management type of support. Works on complex tasks, projects or supports issues that involve a high degree of risk, impacts business unit performance and makes use of the individual's high level of knowledge within one or more areas of specialty. Coaches and mentors more junior technical staff.



**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Asset Manager****Job#: 5400****General Characteristics**

Manages the administration of IT inventory, asset management, and technical service contracts. Maintains and manages software license information and updates. Works with Manager, IT Procurement in the development of enterprise-wide IT purchasing standards and procedures. Creates and manages enterprise-wide asset management systems and serves as liaison to the Finance and Legal departments as it relates to the functions of this position. Ensures corporate and legal guidelines are followed for managing IT hardware and software assets.

Responsible for the evaluation, recommendation, and implementation of asset management systems for all IT technical assets. Provides support to the Finance department by providing asset information and managing the physical inventory control. Defines requirements for asset acquisition and procedures to include management and disposal strategies for the enterprise. Responsible for asset budget preparation, coordinates with IT Procurement on receipt of purchase orders, invoice processing and reconciles changes in inventory. Experience required includes extensive asset and financial management.

**Dimensions****Education:**

Bachelor's Degree in Business Administration, Finance, Accounting, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of business experience including managing team(s) responsible for asset management, finance, procurement and/or service contract management.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to an IT Chief Operating Officer or Chief Sourcing Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION

**Job Title: Asset Management Administrator**

**Job#: 5410**

#### **General Characteristics**

Administers IT purchase and inventory system and management system. Updates and administers asset databases, tracking life cycle of all assets. Receives and manages inventory, ensures security of assets while in inventory. Maintains and manages supplier records, service level agreements, software license information and updates, and assists in developing enterprise-wide IT purchasing standards and procedures. Receives new equipment/software requests and monitors procurement and deployment activities. Verifies financial data (e.g., leased, depreciated or expensed), and monitors and reconciles changes in inventory and performs spot checks to ensure process and system quality.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree in Business Administration, Finance, Accounting, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 1 year of business experience in asset management, procurement, finance or related experience.

##### **Complexity:**

Learner/entry level role. Works as a team member on one or more asset management projects. Performs tasks of low to medium complexity supporting the organization's asset management program. Functions, somewhat independently, under general direction of senior level professionals, supervisors or managers. Generally follows documented procedures and checklists.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Director, HR/IT****Job #: 5500****General Characteristics**

Acts as the strategic liaison between HR and IT. Provides HR leadership support and counsel to the IT organization in the areas of workforce planning, recruiting, training and career development, organization design, performance management, compensation, recognition and change management. Works with CIO and IT leadership team to develop a people strategy that supports the goals of the IT organization. Develop action plans and strategies to address particular IT workforce needs. Promotes innovation and continuous improvement in the IT organization.

Works with the IT leadership team to drive broad cultural change and position the organization for long-term success by helping to build a high performing IT workforce. Analyzes and presents information to the IT leadership team that enables good decision making and encourages the focus around key people issues. Ensures IT human capital management practices and programs align with and are in compliance with corporate HR policies and standards.

This position may have a joint reporting function into human resources and senior IT leadership (the CIO). This is a multifaceted position requiring a broad combination of skills spanning human resources, general management capabilities, and a solid understanding of IT functions, roles and responsibilities.

**Dimensions****Education:**

Bachelor's or Master's Degree in Business Administration, Human Resources, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 10 years of related experience in HR and IT including 3 years of leadership experience in managing medium to large teams and influencing senior level management and key stakeholders. Must have a broad knowledge of the IT function and in-depth knowledge of HR function.

**Breadth:**

Senior level management. Typically manages and mentors mid level managers. Works on multiple, complex projects in a leadership capacity by providing direction and support. Frequently reports to a corporate human resource executive, Chief Information Officer or IT Chief Operating Officer.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Manager, HR/IT Staffing****Job#: 5600****General Characteristics**

Develops and implements sourcing strategies and programs to recruit and select both permanent and contracted staff for the IT organization. Viewed as the in-house consultant on recruiting and retention practices, and strategy. Manages a variety of recruiting efforts, which may include college and Internet recruitment, and use of recruitment firms. Ensures legal and corporate hiring policies are adhered to. Leads succession planning process; performs forecasting needs based on changes within the organization (e.g., retirement statistics, planned moves, reorganizations); creates and maintains a recruiting plan accordingly.

Manages the recruitment process, screening process, conducts interviews for permanent and contract staff (including basic technical interviews), makes recommendations for hire and manages the extension of offers. Has a strong understanding of the competitive marketplace (e.g., key competitors for employees, compensation pressure points, "hot" skills, and competitors' differentiators). Proactive in representing IT issues and needs to HR leadership and is active in the HR and IT community to build awareness of the organization. Manages the relationship with contract staff vendors, negotiates contracts and pricing and maintains records of use of contracted services. May make hiring decisions for selected positions. Viewed as critical and respected resource to IT, and an advocate of IT needs to HR.

**Dimensions****Education:**

Bachelor's Degree in Business Administration, Human Resources, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of related experience in HR and IT including managing team(s) and project(s).

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a corporate human resource executive, IT Chief Operating Officer or Chief Sourcing Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION

**Job Title: Technical Recruiter**

**Job#: 5610**

#### **General Characteristics**

Responsible for sourcing and recruiting IT professionals for the enterprise. Works with management to define candidate qualifications. Interprets the organization's recruiting strategy, identifies sources, develops and executes recruiting plans to meet the organization's technical staff needs. Utilizes multiple channels to recruit candidates, which may include, but is not limited to, colleges, job fairs, Internet, employee referrals, recruitment firms. Identifies, screens and interviews qualified candidates. Conducts background checks and obtains references in accordance with established procedures. Must possess working knowledge of information technology used in the enterprise and understanding of skills required for each technical position. Must have ability to establish strong relationships with various recruitment sources to secure a candidate pool as needed.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Business Administration, Human Resources, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of related experience in recruiting and IT.

##### **Complexity:**

Intermediate professional level role. Works on multiple recruiting projects as a project team member, occasionally as a project leader. Works on small to large, complex assignments that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior recruiters.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: HR/IT Generalist****Job#: 5620****General Characteristics**

Responsible for providing the IT organization with exclusive, full range HR functional support. This involves functions such as recruiting (including college recruiting), maintaining employee personnel records, performance management consulting on organizational/personnel issues, managing compensation and benefits, addressing issues related to employee and labor relations—including AAP and EEO matters, often assessing training needs and designing and presenting training programs. May be involved in grievance and arbitration investigation and preparation, labor contract administration and contract negotiations.

Typically involves interaction with department heads, supervisors, and employees on HR related issues, including personnel policies and procedures, investigations and recommendations on employee disciplinary actions, job analysis and organizational review. Demonstrates knowledge of the IT industry and the business, as IT is their sole customer.

Assists in developing and administering enterprise-wide HR policies (e.g., drug and alcohol policies, absence control programs, work rules). Also involved in developing and maintaining employee communications programs through the design of newsletters and information campaigns for the purpose of informing the organization of HR policies/issues.

**Dimensions****Education:**

Bachelor's Degree in Business Administration, Human Resources, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of related experience in HR and IT.

**Complexity:**

Intermediate professional level role. Works independently, or on multiple projects as a project team member, occasionally as a project leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior HR staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Documentation Specialist/Technical Writer****Job#: 5800****General Characteristics**

Responsible for creation and maintenance of IT documentation. Translates technical and/or complicated information into clear, concise documents appropriate for various target audiences. Works with Development, Quality Assurance and Technical Support to produce a wide variety of technical publications including instructional materials, technical manuals, product documentation and the like for use by both the IT and business community. Interviews subject matter experts and technical staff to collect information, prepare written text, and coordinate layout and material organization. Researches information such as drawings, design reports, equipment and test specifications to fill any gaps.

Reviews, critiques, and edits documentation including design documents, programmer notes and system overviews. Requires knowledge of company product lines and document structure. Depending on the industry/work environment, such documents may include various media, including written and video. Responsibilities include maintenance of internal documentation library, providing and/or coordinating special documentation services as required, and oversight of special projects. Must have strong organizational and project management skills and excellent writing and editing skills.

**Dimensions****Education:**

Bachelor's Degree in Journalism, Technical Writing, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of business or technical writing experience and working knowledge of multiple software and graphics packages.

**Complexity:**

Intermediate professional level role. Works on several moderately complex, to complex document management projects as a project team member. May coach more junior staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Manager, IT Finance****Job#: 6000****General Characteristics**

Provides financial management for the IT organization. Leads the analysis, development and implementation of financial services for IT planning and control. Analyzes and prepares IT budget and develops proposals with supporting documentation and justification. Leads analysis on IT financial conditions, business compliance matters and effectiveness of strategies and programs to business objectives, develops recommendations for senior IT leadership team for a variety of business issues. Provides financial statements for IT leadership team such as monthly budgets and summary reports. Audits and approves invoices for contract payment. Develops financial metrics and conducts audits to ensure compliance. Drives common accounting practices, reconcilements and consistent reporting. Ensures the compliance with all federal and state legislations as well as internal policies and procedures. May be in charge of developing an appropriate pricing model and chargeback scheme for IT services.

**Dimensions****Education:**

Bachelor's Degree in Finance, Economics, Accounting, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 6 years of financial management experience including managing team(s) responsible for financial analysis, planning, cost analysis, market capitalization, P&E ratios and financial statements.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or professional staff. Responsible for supporting complex IT financial activities on an IT enterprise-wide basis and/or business unit level. Frequently reports to a corporate Chief Financial Officer, Chief Information Officer, IT Chief Operating Officer or Operating Unit IT Executive.



**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Director, IT Risk and Compliance****Job#: 6100****General Characteristics**

Leads, develops and maintains the IT risk and compliance management strategy. Develops and maintains policy, standards, processes and procedures to assess, monitor, report, escalate and remediate IT risk and compliance related issues. Works collaboratively with corporate compliance, internal auditing and corporate risk management and various technical teams in the design and implementation of audit, risk assessment and regulatory compliance practices for IT. Leads cross-functional teams in performing reviews and tests of IT internal controls to ensure that existing IT systems are operating as designed and that they contain adequate controls. Facilitates risk assessments and identifies risk themes. Proactively promotes enhancement of technology-related internal controls awareness and training across IT and business units.

Monitors and analyzes technology risk trends, recommends appropriate IT policies, procedures and practices to strengthen internal operations. Directs IT functional teams in the development, implementation, monitoring and reporting of control processes, documentation and compliance routines. Advises IT and business executives on the status of technology risk and compliance issues based on assessment results and information from various monitoring and control systems. Educates IT and business executives on appropriate mitigation strategies and approaches. Provides oversight regarding audit, regulatory and risk management activities across IT functional areas, such as the development and maintenance of regulatory documentation (e.g., Sarbanes-Oxley Act compliance). Coordinates the IT component of both internal and external audits, federal and state examinations. Possesses detailed knowledge of industry regulatory environment and risk management practices, and thorough understanding of local and federal regulations such as Sarbanes-Oxley, Basel II, and HIPAA.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 10 years of IT and business work experience including managing team(s) responsible for risk management, compliance and audit, information security management.

**Breadth:**

Senior level management in risk and compliance management. Has overall responsibility for department decisions and management. Provides strategic direction, coaches and mentors more junior management staff and/or senior level professionals. Has accountability for IT functional/departmental results. Frequently reports to a corporate risk management executive, Chief Financial Officer or Chief Information Officer.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Manager, IT Audit****Job#: 6200****General Characteristics**

Leads and manages internal audit function for information systems audits and compliance-related work (e.g., Sarbanes-Oxley Act compliance) using generally applicable and accepted standards and framework for IT audit (e.g., COBIT). Develops and implements an IT audit strategy and plan to review technical systems controls, identify control weakness and communicate significant control and compliance risk to senior management. Provides recommendations to correct or mitigate IT systems control and compliance weaknesses. Works with corporate and IT risk management team in developing and implementing internal control policies in a wide variety of IT processes. Promotes compliance with regulatory requirements and IT best practices, especially with respect to project management, systems development and information security. Provides control-related consultancy to management teams and ensures the existing/new applications and/or technology infrastructure elements comply with enterprise security, control and audit standards in addition to passing local and federal regulatory examinations.

Supervises and conducts audit activities. Prepares audit reports, advises IT leadership and business line management about the status of technology-related internal control and compliance issues, makes recommendations for risk mitigation, process, control or cost improvement approaches. Plans, manages, directs and reviews the work of technical auditors and consultants.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of IT and/or auditing work experience including managing team(s) responsible for audit, finance or accounting functions. Typically possesses an IT auditing professional designation (e.g., Certified Information System Auditor (CISA)) or accounting professional designation (e.g., CPA).

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a corporate Chief Financial Officer, Chief Information Officer or IT Chief Operating Officer.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: IT Auditor****Job#: 6210****General Characteristics**

Responsible for planning and performing audits of information systems and related processes in a multi-platform environment. This may include reviewing organizational IT policies, standards and procedures and providing advice on their adequacy, accuracy and compliance with government guidelines and regulatory requirements (e.g., Sarbanes-Oxley Act); assisting management in the identification and assessment of technology related risks, and reporting on the adequacy of risk-based controls; evaluating technology and business related controls for integrated IT and business auditing efforts. Participates in new system development and implementation reviews by reviewing project documentation, conducting interviews, assessing work completed.

Ensures that development efforts are in compliance with organizational policies, standards and procedures, and controls are adequately incorporated into the systems; identifies areas of opportunity for process, control or cost improvement. Works with outside auditors to help reconcile discrepancies or support the external auditing functions and local, federal examinations. May be responsible for developing and implementing tools to support automated audit effort. May perform due diligence and special review(s) work as required by management. Has working knowledge of generally applicable and accepted auditing standards and framework (e.g., COBIT) and best practices for IT services management (e.g., ITIL), government guidelines and laws (e.g., Sarbanes-Oxley Act).

**Dimensions****Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Typically requires an IT auditing professional designation (e.g., Certified Information System Auditor (CISA)) or accounting professional designation (e.g., CPA).

**Experience:**

A minimum of 5 years of IT work experience, including 2 to 3 years IT auditing or equivalent experience.

**Complexity:**

Advanced professional level role. Works on multiple auditing projects as a project leader or frequently as the subject matter expert. Works on projects/issues of medium to high complexity that require demonstrated knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: BUSINESS MANAGEMENT/ADMINISTRATION****Job Title: Business Management Specialist****Job#: 6400****General Characteristics**

Assists with the daily operations and provides general administrative support to the assigned IT organization. Responsibilities may include participating and assisting in the preparation of annual business plan for the assigned IT functional area, coordinating the contract management efforts, such as the development of requests for proposals (RFP) and supporting the development and final execution of contracts. Maintains annual expense budgets utilizing proper accounting/budgeting controls, enters financial data into tracking system and provides regular and ad-hoc financial status reports. Implements cost allocation program, and responds to basic questions and concerns from the business areas. Reviews contract invoices, identifies disparities and resolves basic issues with the vendors. May serve as the liaison between IT technical teams, resource manager and human resources organization to develop and implement appropriate IT talent management activities. May participate in the development, implementation and maintenance of IT communication strategies and plans.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of relevant IT and business work experience.

**Complexity:**

Intermediate professional level role. Performs assigned tasks of moderate to high complexity using established procedures, standards and guidelines. Works independently or on multiple projects as a project team member, occasionally as a project leader. Works on small to large, complex projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: TRAINING****Job Title: Manager, Technical Training****Job#: 6600****General Characteristics**

Manages the IT training life cycle, including needs analysis, training strategy and development and delivery of training programs and tools for IT professionals and end-users. Additionally, implements and manages a skills management and competency development process for the IT professional staff and end-user community. Coordinates or provides services to identify business and subsequent training drivers for the organization and identifies technology drivers for the analysis of roles and their associated skills and competencies. Leads analysis of current skills to identify skill gaps and works with IT to prioritize skills training and development imperatives. Ensures a technical learning environment exists in the organization. Responsible for ensuring capability of technology is maximized through effective training, resulting in transfer of knowledge and skills that support organizational needs.

Oversees the development of curriculums and specific courseware to address skill gaps for IT professionals and end-users, and oversees the selection and usage of various training delivery systems and certification/testing methods to assess the effectiveness and efficiency of programs. Measures training return on investment (ROI) and helps to pilot test new training techniques, strategies, tools and processes to increase training effectiveness.

**Dimensions****Education:**

Bachelor's Degree in Instructional Technology, Computer Science, Information Systems, Education, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 7 years of Training (including curriculum development for IT and instructional technology) experience, 2 or more years of training management experience.

**Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a corporate training officer, IT Chief Operating Officer or Chief Information Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: TRAINING

**Job Title: Technical Trainer**

**Job#: 6610**

#### **General Characteristics**

Responsible for the creation, and delivery of training and development programs to all levels of end-users and IT professionals. Involved in training needs assessment process and vendor selection. Works closely with both IT and the business to understand system and training needs for applications and packages supported.

Develops documentation for custom applications and packaged applications, using a variety of mediums as needed. Designs training programs, classes, workshops, and Computer Based Training (CBT) and on-line help. Delivers training to a variety of audiences, understanding and applying adult learning principles. More junior position works on and delivers training programs for standard packages and productivity tools (e.g., Word, Excel, e-mail). More senior position delivers technical training to IT professionals, and requires in-depth knowledge and experience in the systems/applications/programming languages supported (e.g., Oracle, NT, C++).

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Instructional Technology, Computer Science, Information Systems, Education, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of Training (including IT course development and delivery) experience.

##### **Complexity:**

Intermediate professional level role. Works independently or on multiple IT training projects as a project team member, occasionally as a project leader. Works on small to large, complex IT training projects that require increased skill in multiple technical environments and knowledge of a specific business area. May coach more junior staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SECURITY MANAGEMENT

**Job Title: Security Manager**

**Job#: 6800**

##### **General Characteristics**

Manages the development and delivery of IT security standards, best practices, architecture and systems to ensure information system security across the enterprise. Implements processes and methods for auditing and addressing non-compliance to information security standards; facilitates migration of non-compliant environments to compliant environments. Conducts studies within and outside the organization to ensure compliance with standards and currency with industry security norms. Manages and participates in the planning and implementation of security administration for all IT projects. Responsible for evaluation and selection of security applications and systems. Makes recommendations and assists in the implementation of changes to work methods and procedures to make them more effective or to strengthen security measures. In organizations where customers or vendors access databases/applications, security takes on a higher level of criticality for the protection of corporate intellectual capital.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT work experience with a broad range of exposure to all aspects of business planning, systems analysis and applications development. Experience with managing team(s) and project(s) for information security management.

###### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and subject matter expert. Frequently reports to a Corporate Security Officer, Chief Information Security Officer, Chief Technology Officer or IT Chief Operating Officer.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: SECURITY MANAGEMENT****Job Title: Security Analyst****Job#: 6810****General Characteristics**

Develops and manages security for more than one IT functional area (e.g., data, systems, network and/or Web) across the enterprise. Assists in the development and implementation of security policies and procedures (e.g., user log-on and authentication rules, security breach escalation procedures, security auditing procedures and use of firewalls and encryption routines). Prepares status reports on security matters to develop security risk analysis scenarios and response procedures. Responsible for the tracking and monitoring of software viruses. Enforces security policies and procedures by administering and monitoring security profiles, reviews security violation reports and investigates possible security exceptions, updates, and maintains and documents security controls.

Involved in the evaluation of products and/or procedures to enhance productivity and effectiveness. Provides direct support to the business and IT staff for security related issues. Educates IT and the business about security policies and consults on security issues regarding user built/managed systems. Represents the security needs of the organization by providing expertise and assistance in all IT projects with regard to security issues. Must have extensive knowledge in networking, databases, systems and/or Web operations. More junior level position primarily focuses on security administration; a more senior level position is involved in developing enterprise security strategies, management of security projects and the most complicated security issues.

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 4 years of combined IT and security work experience with a broad range of exposure to systems analysis, applications development, database design and administration; one to two years of experience with information security. Requires knowledge of security issues, techniques and implications across all existing computer platforms.

**Complexity:**

Intermediate professional level role. Works independently or on multiple IT security projects as a project team member, occasionally as a project leader. Works on small to large, complex security issues or projects that require increased skill in multiple IT functional areas. May coach more junior staff.



## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SECURITY MANAGEMENT

**Job Title: Data Security Specialist**

**Job#: 6820**

#### **General Characteristics**

Responsible for the planning, design, enforcement and audit of security policies and procedures which safeguard the integrity of and access to enterprise systems, files and data elements. Responsible for acting on security violations. Maintains knowledge of changing technologies, and provides recommendations for adaptation of new technologies or policies. Recognizes and identifies potential areas where existing data security policies and procedures require change, or where new ones need to be developed, especially regarding future business expansion. Provides management with risk assessments and security briefings to advise them of critical issues that may affect customer, or corporate security objectives. Evaluates and recommends security products, services and/or procedures to enhance productivity and effectiveness. Oversees security awareness programs and provides education on security policies and practices.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 4 years of IT work experience with a broad range of exposure to systems analysis, applications development, database design and administration; one to two years of experience with information security. Requires knowledge of security issues, techniques and implications across all existing computer platforms.

##### **Complexity:**

Intermediate professional level role. Works on multiple projects as a team member and leads the data-related security components. Develops security solutions for medium to highly complex assignments. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SECURITY MANAGEMENT

**Job Title: Network Security Specialist**

**Job#: 6830**

#### **General Characteristics**

Involved in the full life cycle of network security management. Assists in the development and implementation of security policies, procedures and measures in a networking environment. Responsible for firewall configuration, maintenance, monitoring and other various network security measures. Performs security assessments and reviews networking initiatives for security compliance. Prepares status reports on security matters to develop security risk analysis scenarios and response procedures. Involved in the continual improvement of the network infrastructure and implementation of new security-based technologies. Evaluates and recommends security products for various platforms in the networking environment. Educates users about network security policies and consults on security issues. Must have broad technical knowledge of client/server, network topology and network/infrastructure security.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of combined IT and security work experience with a broad exposure to infrastructure/network and multi-platform environments. Requires knowledge of security issues, techniques and implications across all existing computer platforms.

##### **Complexity:**

Intermediate professional level role. Develops security solutions for medium to high complex assignments. Works on multiple projects as a team member and lead network-related security components. May coach more junior technical staff.

**CONTRACT EXHIBIT J****JOB FAMILY DESCRIPTIONS****JOB FAMILY: SECURITY MANAGEMENT****Job Title: Systems Security Specialist****Job#: 6840****General Characteristics**

Develops, evaluates and manages systems security across the enterprise. Areas of concentration include account management, password auditing, network based and Web application based vulnerability scanning, virus management and intrusion detection. Requires technical expertise in systems administration and security tools, combined with the knowledge of security practices and procedures. Assists in the development and implementation of security policies and procedures (e.g., user log-on and authentication rules, security breach escalation procedures, security auditing procedures and use of firewalls and encryption routines). Prepares status reports on security matters to develop security risk analysis scenarios and response procedures.

Enforces security policies and procedures by administering and monitoring security profiles, reviews security violation reports and investigates possible security exceptions, updates, and maintains and documents security controls. Involved in the evaluation of products and/or procedures to enhance productivity and effectiveness. Provides direct support to the business and IT staff for systems security related issues. Educates users on systems security standards and procedures. Must have broad technical knowledge of network operating systems (e.g., UNIX, NT).

**Dimensions****Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 2 years of combined IT and security work experience with a broad exposure to infrastructure/network and multi-platform environments. Requires knowledge of security issues, techniques and implications across all existing computer platforms.

**Complexity:**

Intermediate professional level role. Develops security solutions for medium to high complex assignments. Works on multiple projects as a team member and lead systems-related security components. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: SECURITY MANAGEMENT

**Job Title: Web Security Specialist**

**Job#: 6850**

##### **General Characteristics**

Assists in the development and management of Web security policy and procedures for the enterprise. Evaluates information security solutions on Inter/Intranet/Extranet environments. Responsible for monitoring, assessing and reviewing rule base and configurations of firewalls and intrusion detection systems. Performs security assessment reviews of the e-commerce applications for compliance to security policies, standards and practices. Reviews software products and recommends security solutions for various platforms and initiatives. Educates users on the Web security standards and practices. Reviews and prepares status reports on security matters to develop security risk analysis scenarios and response procedures.

Ensures compliance to security policies and procedures by administering and monitoring security profiles; reviews security violation reports and investigates possible security exceptions; updates, maintains and documents security controls. Must have knowledge of client/server and Web technologies and a strong understanding of e-commerce operations.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 3 years of combined IT and security experience with a broad range of exposure to infrastructure/Web and multi-platform environments. Requires knowledge of security issues, techniques and implications across all existing computer platforms.

###### **Complexity:**

Intermediate professional level role. Develops security solutions for medium to high complex assignments. Works on multiple projects as a team member and leads Web-related security components. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS CONTINUANCE MANAGEMENT

**Job Title: Manager, Business Continuance**

**Job#: 7000**

##### **General Characteristics**

Responsible for the implementation and integration of risk management procedures across the enterprise, based on a thorough understanding of key IT services that must be maintained to reduce financial loss and critical customer service capability. Ensures monitoring and testing of business continuance procedures, ensures response to system failures, and is proactive in building processes to minimize/eliminate downtime. Develops service level risk management agreements with the business and with vendors.

##### **Dimensions**

###### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

###### **Experience:**

A minimum of 7 years of IT and business work experience including managing large-scaled IT infrastructure and support functions, risk management, process re-engineering or improvement. Experience with managing team(s) and project(s).

###### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a corporate risk management officer, Chief Information Officer, Chief Information Security Officer, Chief Technology Officer or IT Chief Operating Officer.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: BUSINESS CONTINUANCE MANAGEMENT

**Job Title: Business Continuanace Specialist**

**Job#: 7010**

**General Characteristics**

Develops risk management procedures, business continuance scenarios, and contingency plans for central and distributed systems and networks to maintain operations during downtime and/or major disasters. Identifies and makes recommendations regarding critical points of failure. Develops and implements policies and procedures for business continuance and test plans with various operational and support groups in IT. Involved in the evaluation and selection of vendors to ensure service level agreement meet business continuance planning requirements.

**Dimensions**

**Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

**Experience:**

A minimum of 3 years of IT work experience in information systems support, administration and risk management.

**Complexity:**

Intermediate professional level role. Performs contingency planning and analysis for medium to highly complex assignments. Works on multiple projects as a team member and leads business continuance planning components. May coach more junior technical staff.

## CONTRACT EXHIBIT J

### JOB FAMILY DESCRIPTIONS

#### JOB FAMILY: PRODUCT DEVELOPMENT

**Job Title: Manager, Product Development**

**Job#: 7200**

#### **General Characteristics**

Manages research and development activities relating to the design and development of software or hardware products and qualification or re-qualification of new and existing products. Works with a cross-functional team to ensure fulfillment of product requirements, evaluates product performance and transition products from development to commercialization. Assists in determining product delivery and deployment dates for new product releases, feature and maintenance releases and regular corrective service or service pack releases.

Acts as a technical consultant to the product organization and leads research, and prototyping of innovative technologies and products. Ensures the technology and architectural roadmap of engineering is properly aligned with and supports the product/business road map. Acts as a customer liaison on technical issues related to product integration, custom development and requirements. May lead major releases and ensure feature enhancements respond to customer requests. Responsible for product delivery managing schedules and tasks related to all aspects of product development.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Engineering, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of high-tech industry, product engineering and/or IT work experience. Experience with managing team(s) responsible for software, hardware design, engineering and development functions.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a corporate senior level software development executive, research and development executive or Chief Technology Officer.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PRODUCT DEVELOPMENT

**Job Title: Product Architect**

**Job#: 7210**

#### **General Characteristics**

Chairs the product architecture team and provides technical leadership in the planning, design and architect phases of software or hardware product development. Identifies, evaluates, and recommends solutions using advanced architectures and technologies to facilitate rapid development and implementation. Understands key competitors' products and differentiating features. Works with a cross-functional team to translate customer requirements into detailed architectural approaches and product specifications, creates realistic development plans and schedules, evaluates and prioritizes requests for product changes and enhancements.

Understands business needs as well as customer and market requirements. Applies creativity, in-depth technical and theoretical knowledge, and experience in solving highly complex architectural design problems. Recommends new technology directions or options to maintain products' competitive advantages.

Communicates technology design and any related issues to technical and non-technical audiences including customers and technical partners. Prepares and documents product architecture plans. May design technical testing methods to meet target product scalability and performance objectives. Participates in the standards committees and other industry gatherings to track industry trends and maintains knowledge of new technologies to better serve the enterprise's architecture needs.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Engineering or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of high-tech industry, product engineering and/or IT work experience.

##### **Complexity:**

Expert/lead technical role. Provides technical expertise and direction for the development of complex hardware and software projects. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.



## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PRODUCT DEVELOPMENT

**Job Title: Product Engineer**

**Job#: 7220**

#### **General Characteristics**

Responsible for all aspects of software or hardware product delivery and performance. Works with design engineering and test team to drive products from design completion to volume production release. Performs various engineering tests to verify and validate product designs, such as defining and specifying new product Design Verification Test (DVT) requirements and participation in the DVT process. Supports product evaluation and qualification on leading edge technology components. Ensures that production schedules are followed and product(s) meet specifications and quality requirements. Interacts with product engineering, quality, manufacturing and marketing teams to analyze and provide technical support to help resolve customers' product related problems/issues.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Engineering or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 4 years of high-tech industry, product engineering and/or IT work experience.

##### **Complexity:**

Intermediate professional level role. Performs product design and engineering work for medium to highly complex assignments. Works on multiple projects as a team member, sometimes as a technical leader. May coach more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PRODUCT DEVELOPMENT

**Job Title: Product Developer**

**Job#: 7230**

#### **General Characteristics**

Responsible for designing and developing software or hardware product. Understands business and customer requirements that drive the analysis and design of technical solutions. Participates in all phases of product development lifecycle, including the analysis, design, test and integration of products. Develops design specifications and parameters that are in compliance with products' architectural blueprints. Researches, evaluates and incorporates new technology and tools to enhance the product development process. Resolves customer complaints with products and responds to suggestions for improvement and enhancements. May assist in development of product user manuals.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Engineering or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 4 years of high-tech industry, product engineering and/or IT work experience.

##### **Complexity:**

Intermediate professional level role. Performs product design and development work for medium to highly complex assignments. Works on multiple projects as a team member, sometimes as a technical leader. May coach more junior technical staff.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION**

**Job Title: Manager, Systems Software**

**Job#: 7400**

#### **General Characteristics**

Responsible for managing the programming, administration and support activities for the enterprise's operating systems that may reside on multiple platforms. Has a high level understanding of operating systems and foundation architecture. Accountable for operating systems software selection and development and continued maintenance of such systems to improve efficiencies. Develops departmental standards and procedures including systems programming standards and program documentation requirements. Defines and monitors multiple projects, provides technical and administrative supervision. Must interface with members of the IT and user community to coordinate activities relating to the implementation of new software. Provides technical consultation and support to users and other IT staff.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience including managing team(s) responsible for systems engineering, development, administration and support.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a Chief Information Officer, IT Chief Operating Officer, Chief Technology Officer, Operating Unit IT Executive or Departmental IT Executive.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION**

**Job Title: Systems Architect**

**Job#: 7410**

#### **General Characteristics**

Responsible for providing senior level expertise on decisions and priorities regarding the enterprise's overall systems architecture. Facilitates the establishment and implementation of standards and guidelines that guide the design of technology solutions including architecting and implementing solutions requiring integration of multiple platforms, operating systems and applications across the enterprise. Reviews, advises and designs standard software and hardware builds, system options, risks, costs vs. benefits and impact on the enterprise business process and goals.

Develops and documents the framework for integration and implementation for changes to technical standards. Assists in the development of and manages an architecture governance process. Provides technical guidance to project team areas as appropriate. Tracks industry trends and maintains knowledge of new technologies to better serve the enterprise's architecture needs.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience in infrastructure/systems environments performing systems planning, architecture design, engineering (hardware and software) and optimization.

##### **Complexity:**

Expert/lead technical role. Defines systems architecture and design for the enterprise. Works on multiple projects as a project leader or as the subject matter expert. Works on projects/issues of high complexity that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION

**Job Title: Systems Software Programmer**

**Job#: 7420**

#### **General Characteristics**

Responsible for the analysis, development, modification, installation, testing and maintenance of operating systems software. Possesses a strong understanding of systems programming, graphical user interfaces and control languages. Evaluates vendor supplied software packages and makes recommendations to IT management. Modifies and/or debugs vendor-supplied utilities and packages. Modifies, installs and prepares technical documentation for system software applications. Diagnoses, isolates and de-bugs software problems and performs problem resolution. Monitors systems capacity and performance, plans and executes disaster recovery procedures and provides Tier 2 technical support.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 4 years of IT work experience in systems administration and programming.

##### **Complexity:**

Intermediate professional level role. Works on multiple products, activities and projects as a project team member, occasionally as a project leader. Works on moderately complex tasks, projects, activities or support issues that require increased skill in multiple technical environments and has expertise in one product/system. May coach more junior technical staff.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION**

**Job Title: Groupware Specialist**

**Job#: 7430**

#### **General Characteristics**

Responsibilities include defining the business requirements for the organization's next generation of collaborative work tools, which involves working with end-users to develop specifications for the development and implementation of groupware applications (e.g., Lotus Notes, Microsoft Exchange). Based on the business requirements, responsible for the implementation, maintenance and support of groupware systems. Evaluates and recommends associated hardware/software solutions based on business requirements and user needs.

Responsibilities include providing technical leadership in the design, development and promotion of selected groupware strategies. Actively involved in engineering and deploying various groupware applications such as team collaborative computing, Internet and wireless access, document sharing and next generation messaging clients.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 2 years of IT work experience in programming and systems analysis. Experience with groupware/messaging technologies, tools and relevant platforms.

##### **Complexity:**

Intermediate professional level role. Works on multiple products, activities and projects as a project team member, occasionally as a project leader. Works on moderately complex tasks, projects, activities or support issues that require increased skill in multiple technical environments and has expertise in one product/system. May coach more junior technical staff.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION**

**Job Title: Systems Administrator**

**Job#: 7440**

#### **General Characteristics**

Deploys the release of new technologies as well as designs, installs, configures, maintains and performs system integration testing of PC/server operating systems, related utilities and hardware. Responsible for trouble shooting server problems as reported by users. Researches, evaluates and recommends software and hardware products. Supports Web access and electronic messaging services and maintains a secure systems environment. Provides new hardware specifications to users based on application needs and anticipated growth, installs new servers and maintains the server infrastructure.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience. Requires a high level of expertise in multiple system environments.

##### **Complexity:**

Intermediate professional level role. Defines procedures for monitoring and evaluates, diagnoses and establishes work plan to resolve system issues. Performs troubleshooting for complex hardware, software and network problems. Works on multiple projects as a project team member, occasionally as a project leader. May coach more junior technical staff.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION**

**Job Title: UNIX Systems Administrator**

**Job#: 7450**

#### **General Characteristics**

Installs, configures, maintains and performs system integration testing of UNIX based operating systems, related utilities and hardware. Responsible for troubleshooting UNIX-based hardware and software problems. Monitors systems activities and fine tunes system parameters and configuration to optimize performance and ensure security of systems. Performs capacity analysis, monitors and controls usage of disk space. Develops procedures for routine administration including backup/restore, shutdown, and startup. Provides recommendations for improving the server environment, such as capacity thresholds, security gaps, patch levels and hardware recalls.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience. Requires a high level of expertise in multiple system environments with emphasis in UNIX-based systems.

##### **Complexity:**

Intermediate professional level role. Defines procedures for monitoring and evaluates, diagnoses and establishes work plan to resolve system issues. Performs troubleshooting for complex hardware, software and network problems. Works on multiple projects as a project team member, occasionally as a project leader. May coach more junior technical staff.



## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: SYSTEMS PROGRAMMING AND ADMINISTRATION

**Job Title: Storage Management Specialist**

**Job#: 7460**

#### **General Characteristics**

Provides efficient and reliable storage allocation and defines backup, recovery, archival procedures. Develops and implements business continuity practices for storage management. Installs, configures, tests and implements storage management software and hardware. Monitors use and availability of storage resources. Maintains and modifies backup and recovery procedures to meet high availability and mission critical business needs. Troubleshoots storage related issues and takes appropriate actions. Generates reports and analysis on storage usage. Maintains storage configurations to provide capacity planning and performance monitoring/tuning of systems. Benchmarks, evaluates and makes recommendations for the selection of storage management software and hardware products. Possesses skills and knowledge related to network, operating systems, Storage Area Network (SAN), Network Attached Storage (NAS) and tape backup solutions.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience. Requires a high level of expertise in multiple system environments. Experience with networking, storage and systems administration.

##### **Complexity:**

Intermediate professional level role. Defines procedures for monitoring and evaluates, diagnoses and establishes work plan to resolve storage management issues. Works on multiple products, activities and projects as a project team member, occasionally as a project leader. May coach more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: Director, Enterprise Architecture**

**Job#: 7500**

#### **General Characteristics**

Leads the creation and/or evolution of the enterprise architecture function/program including coordination of an appropriately balanced pursuit of enterprise business, information, technical and solution architectures. Leads the identification and analysis of enterprise business drivers to develop enterprise architecture requirements. Analyzes technology industry and market trends and determines potential impact upon the enterprise. Leads the development of enterprise architecture governance structure based on business and IT strategies. Oversees enterprise architecture implementation and ongoing refinement activities. Directs the development and execution of a communication (including education) plan for enterprise architecture standards. Acts as a sounding board or consultant to IT and business leaders in the development of IT solutions for business needs.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 10 years of IT and business/industry work experience including architecture design and deployment, systems lifecycle management and infrastructure planning and operations, with 3 years of leadership experience in managing multiple, large, cross-functional teams or projects, and influencing senior level management and key stakeholders.

##### **Breadth:**

Senior level management. Participates in the technical aspects of strategic decisions regarding IT for the enterprise. Implements and manages those initiatives with complete autonomy. Makes decisions for the organization based on the highest degree of technical complexity and through understanding the far-reaching implications across the IT organization. Frequently reports to a Chief Information Officer or Chief Technology Officer of an enterprise.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: Manager, IT Business Planning**

**Job#: 7600**

#### **General Characteristics**

Assists the IT organization in defining and implementing its business plan and goals to support the strategy and goals of the organization. Responsible for working with IT and business leaders to create the business plan for IT. Assists in the cascading of plans to the various IT divisions/departments. Scans the external IT environment to provide a common set of planning assumptions, competitive analysis, current and future market assessments for products and services to the business, and a common set of planning processes and tools to assist those with planning responsibility in IT. Assists IT and business leadership in actualizing the business plans within their own area of responsibility, working with them to ensure that technical and resource decisions link to the overall IT plan. Works closely with the enterprise's business planning leaders to ensure alignment.

Responsible for ensuring that business planning and purpose is considered in all key IT decisions, and therefore must be involved in the discussion and decision making process for technology, business, and human resource investments on an on-going basis. Works with Finance and Human Resources to represent the needs of IT and understand the cost and human resources impact of those needs in creating, implementing and adjusting business plans.

This position typically reports to the CIO. Ensures alignment of the IT strategy to the business strategy. Responsible for ensuring integration of all work performed across all business units. Responsible for educating senior business leaders on the IT strategy as well as educating senior IT leadership on the direction of the business. High degree of business complexity and impact to overall success of IT in meeting business needs.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, Finance, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT and business work experience with a broad range of exposure to various technical environments and business segments. Experience with managing team(s) responsible in strategic planning, infrastructure and operational support functions.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and a subject matter expert. Frequently reports to a Chief Information Officer, IT Chief Operating Officer, Chief Technology Officer or Operating Unit IT Executive.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: BUSINESS ANALYSIS AND PLANNING**

**Job Title: Enterprise Architect**

**Job#: 7610**

#### **General Characteristics**

Provides overall direction, guidance and definition of an enterprise's architecture to effectively support the corporate business strategy. Responsibilities include researching, analyzing, designing, proposing, and delivering solutions that are appropriate for the business and technology strategies. Must have significant business knowledge and have one or more areas of technical expertise in which they concentrate. Interfaces across several business areas, acting as visionary to proactively assist in defining the direction for future projects. Responsible for conception of solutions, building consensus and the selling and execution of such solutions.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT work experience in multiple IT areas and 2 to 3 years of relevant enterprise-wide architecture experience in one or more specialty areas.

##### **Complexity:**

Expert/lead technical role. Defines enterprise-wide architectures and designs across multiple IT functional areas. Works on multiple projects as a project leader or as the subject matter expert. Works on highly complex projects that require in-depth knowledge across multiple technical areas and business segments. Coaches and mentors more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: Business Process Consultant**

**Job#: 7620**

#### **General Characteristics**

Facilitates the optimization of business unit performance by enhancing the alignment between business processes and information technology. Responsible for actively resolving day-to-day technology needs of the business unit with a focus on the analysis of processes—dissecting problems and suggesting solutions. Includes complex systems process analysis, design and simulation. Must understand technical problems and solutions in relation to the current, as well as the future business environment. Must be able to suggest plans to integrate new and existing processes. Provides input and supports planning and prioritization for business process engineering related activities, including developing the business unit process engineering plan and integrating that plan with the corporate plan. Possesses knowledge and experience leveraging both IT solutions and business process improvements.

Participates in continuous review and update to ensure that processes meet changing business unit conditions. Identifies processes for improvement, documents existing processes, identifies and analyzes gaps between current processes and the desired state, designs new processes, develops process performance measures and plans the transition to a new process. Provides counsel and leadership on future use of technology and business process improvements. This requires a high level of understanding of the organization's business systems and processes as well as industry-wide requirements. Must demonstrate expertise in strategic planning, tactical execution, project management, process management and business systems requirements definition.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of IT experience, 4 years of experience in process engineering and 2 years experience in project management.

##### **Complexity:**

Expert/lead technical role. Works on large, complex projects that have enterprise-wide impact and require subject matter expertise of multiple process improvement areas and mastery of process improvement tools. Works as a project team member on multiple projects to facilitate process improvements involving multiple sites or business areas, often as a project leader. Coaches and mentors more junior staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: IT Business Consultant**

**Job#: 7630**

#### **General Characteristics**

Works with business leaders and acts as a liaison between IT and business units (typically leadership for assigned business units) or vendors. Viewed as integral to the business in any decisions that may be impacted by technology. Acts as a business relationship manager responsible for the collection, analysis, review, documentation and communication of business needs and requirements to the IT organization. Leads the gathering of business needs as well as the design of solutions through direct interaction with business unit leaders. Focuses on developing and improving business processes at all times, assisting with the development of metrics, both within the technology and business organizations.

Has a strong understanding of information systems, business processes, the key drivers and measures of success for the business, and the short- and long-term direction of the business and technology. Identifies, proposes and influences business solutions, negotiates deliverables and requirements across multiple business customers or organizations. Ensures that the design and integration of proposed system, software and hardware solutions leads to the development and growth of the business through effective use of technology. Integrally involved in 'buy vs. build' decisions.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of relevant technical and business work experience.

##### **Complexity:**

Expert/lead technical role. Works with business senior management in one business segment and corporate staff executives to align technology solutions with business strategies. Demonstrates breadth and in-depth knowledge of a business area to identify and communicate how IT solutions can add value. Supports one or more key business functions. Issues and interactions tend to be highly complex and have significant strategic importance. Serves as a project team member for strategic planning or as a team lead.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: BUSINESS ANALYSIS AND PLANNING**

**Job Title: Business Analyst**

**Job#: 7640**

#### **General Characteristics**

Serves as a liaison between the business community and the IT organization in order to provide technical solutions to meet user needs. Possesses expertise in the business unit(s) they support, as well as, an understanding of the IT organization's systems and capabilities. Analyzes business partner's operations to understand their strengths and weaknesses to determine opportunities to automate processes and functions. Assists in the business process redesign and documentation as needed for new technology. Translates high level business requirements into functional specifications for the IT organization and manages changes to such specifications. Educates the IT organization on the direction of the business. Negotiates agreements and commitments by facilitating communication between business unit(s) and IT from initial requirements to final implementation. Possesses an understanding of technological trends and uses this knowledge to bring solutions to business units supported to enhance the enterprise's competitive edge. May make recommendations for buy vs. build decision.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of relevant technical or business work experience.

##### **Complexity:**

Intermediate professional level role. Works with business partners within one business function to align technology solutions with business strategies. Demonstrates an informed knowledge of a business area to resolve problems on an ongoing business. Supports several moderately complex business processes. Works on multiple projects as a project team member, occasionally as a project leader. May coach more junior staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: Director, Business Relationships**

**Job#: 7700**

#### **General Characteristics**

Overall responsibility for serving as the strategic interface with assigned business units for the purpose of business/IT strategy development, solution discovery, service management, risk management and relationship management. Serves as the business relationship linkage between the business units and IT (at the executive level). Provides highly-valued strategic consulting level support and guidance through key IT initiatives.

Communicates decisions, priorities and relevant project information to appropriate levels of staff regarding business unit requests, projects and initiatives. Proactively shares knowledge of technology risks and opportunities to build competitive advantage and improve efficiency and effectiveness of business units.

Proactively serves as a “trusted advisor”, and is the primary point of contact from IT for business line executives, managers and key contacts and represents IT in selling IT services and capabilities. Provides support in delivering technology products and services to ensure business satisfaction. Strives to be a valued and preferred IT service provider to all business partners. Focuses on strategic initiatives and plans, proactive, anticipatory and driving in nature and provides significant value to business units. Facilitates the planning and execution of business changes through the use of technology. Serves a lead role in enabling the business to achieve their objectives through the effective use of technology.

#### **Dimensions**

##### **Education:**

Bachelor’s or Master’s Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 10 years of IT and business work experience with a broad range of exposure to various technical environments and business segments. At least 3 years of experience with managing team(s) responsible in strategic planning, business development or client management and working with a broad range of diverse and complicated business units. Must possess very strong business acumen.

##### **Breadth:**

Senior level management. Works with business unit and corporate staff executives to develop a technology strategy that aligns with IT and across all business units. Must have strong understanding of each business unit to include their business drivers for success, process and approaches to business models. Frequently reports to a Chief Information Officer, IT Chief Operating Officer or Chief Technology Officer.



## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: BUSINESS ANALYSIS AND PLANNING

**Job Title: Manager, Customer Relations**

**Job#: 7800**

#### **General Characteristics**

Overall responsibility for establishing, managing and maintaining strategic relationships with external customers in one or more business segments. Regularly interacts with functional groups within the IT organization to communicate and clarify customer requirements. Performs as liaison between enterprise and end-users, outside vendors, contractors, and consultants to define and establish service and support requirements. Investigates and resolves customer relationship problems. May participate in contract negotiation and administration.

Analyzes and determines operational and financial impact of new product and service offerings. Proposes changes or solutions to products and services for optimal business results. Assists in organization change management and functions as an internal consultant in analyzing business processes, assessing and defining customer specifications and requirements, proposing business solutions that prioritizes technology and services needs to satisfy customer requirements, and facilitating solution design, building and testing.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, Marketing, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of relevant IT and business work experience. Experience with managing teams and projects.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex projects as a project leader and the subject matter expert. Frequently reports to a Chief Information Officer, IT Chief Operating Officer or Chief Technology Officer.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: RELEASE MANAGEMENT

**Job Title: Configuration Management Analyst**

**Job#: 8000**

#### **General Characteristics**

Provides Configuration Management (CM) support for the customer's software baseline control efforts. Maintains the baseline using automated CM tools. Responsible for maintaining project software and documentation inventory and configuration baselines. Establishes and maintains the CM processes and procedures. Defines and implements procedures for releasing products throughout the whole product life cycle. Serves on the Configuration Control Board (CCB). Produces builds of products for use in testing and in production; identifies and implements processes to strengthen, streamline and automate build processes; serves as an advocate for best practices; drives the development and maintenance of build automation tools; maintains the source code change control; performs distribution partner and corporate client set-ups.

Performs software deficiency and change request updates and reporting. Maintains the project notebook library and software development folders. Tracks and maintains the project change requests, impact assessments, incident reports, and software change notices on a continuous basis. Measures and reports on success metrics benchmarking performance against world class measures. Supports management with technical performance data from the CM process.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience in systems/applications development functions.

##### **Complexity:**

Intermediate professional level role. Works on multiple products, activities and projects as a project team member, occasionally as a project leader. Works on moderately complex tasks, projects, activities or support issues that require increased skill in multiple technical environments. May coach more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: RELEASE MANAGEMENT

**Job Title: Release/Build Engineer**

**Job#: 8010**

#### **General Characteristics**

Develops and maintains the build environment, the source code control system and the issue tracking systems. Creates and tests builds, resolves issues, applies labels to file and communicates build status. Responsible for building scripts and installation procedures. Proactively identifies and implements procedures to streamline the build process which may drive the development and maintenance of an automated build process with automatic notification of build and unit test failure problems to responsible engineers. May assist engineering management in making choices for source code management systems, and other development and testing tools. Knowledge of quality methods and procedures as well as PC, PVCS, UNIX and scripting languages is required for successful performance in this role.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience with at least 2 years related to release management. Proficient in the use of project management, spreadsheet and database query tools. Has subject matter expertise in release management process.

##### **Complexity:**

Intermediate professional level role. Works on multiple releases/projects as a subject matter expert and as a project leader. Works on complex projects that require expertise across multiple disciplines and environments. May coach more junior technical staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Director, Program Management**

**Job#: 8200**

#### **General Characteristics**

Responsible for building and managing the project/program management office/function for IT. Defines and develops enterprise-wide IT project/program management practices, governance standards, processes and metrics. Ensures projects/programs are defined, tracked and communicated in a consistent and effective manner. Incorporates effective change and risk management controls. Partners with IT and business leadership and other key stakeholders to define opportunities, to identify and prioritize projects based on predefined criteria (return on investment, productivity, compliance). Directs project/program managers with business case development. Responsible for ensuring all projects within IT portfolios/programs are delivered on time, within budget and to an agreed quality level. Must possess extensive knowledge and expertise in project/program management, portfolio management methodologies and tools. This is a single incumbent position that typically exists in a large enterprise with multiple program managers and/or project managers as direct reports.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Business Administration, or other related field. Or equivalent work experience. Project Management certification is required.

##### **Experience:**

A minimum of 10 years of IT and business/industry work experience, with at least 3 years of leadership experience and 5 years managing projects and/or project portfolios.

##### **Breadth:**

Senior level management with overall responsibility for the enterprise-wide project/program management practices. Accountable for on-time, within budget and quality delivery of all IT projects/programs. Directs and mentors a team of program managers, project managers, portfolio managers and/or other project management staff. Frequently reports to a Chief Information Officer, Chief Technology Officer or IT Chief Operating Officer.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Program Manager**

**Job#: 8210**

#### **General Characteristics**

Responsible for managing one or more highly complex or enterprise-wide IT program(s) consisting of multiple projects. Develops the program strategy, supporting business case and various enterprise-wide high-level project plans. Ensures integration of projects and adjusts project scope, timing, and budgets as needed, based on the needs of the business. Communicates with IT leadership, business leadership and IT Business Consultants to communicate program strategy, direction and changes. Responsible for delivering all projects contained in the IT project portfolio on time, within budget and meeting the strategic and business requirements. Responsible for tracking key project milestones and recommending adjustments to Project Managers. Partners with senior leadership of the business community to identify and prioritize opportunities for utilizing IT to achieve the goals of the enterprise. Must possess extensive knowledge and expertise in the use of Project Management methodologies and tools. This is a single or multiple incumbent(s) position that typically exists in a small to medium size enterprise with multiple project managers, project leaders and/or project support staff as direct reports.

#### **Dimensions**

##### **Education:**

Bachelor's or Master's Degree in Computer Science, Business Administration, or other related field. Or equivalent work experience. Project Management certification is required.

##### **Experience:**

A minimum of 10 years of IT and business/industry work experience, with at least 3 years of leadership experience and 5 years in managing projects.

##### **Breadth:**

Senior level management with overall responsibility for the management of one highly complex or enterprise-wide program consisting of multiple projects. Responsible for managing all aspects of the design, development and implementation of the program. Directs and mentors a team of project managers, portfolio managers and/or other project management staff. Frequently reports to a Chief Information Officer, Chief Technology Officer, IT Chief Operating Officer or Director, Program Management.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Project Manager**

**Job#: 8220**

#### **General Characteristics**

Responsible for overall coordination, status reporting and stability of project oriented work efforts. Establishes and implements project management processes and methodologies for the IT community to ensure projects are delivered on time, within budget, adhere to high quality standards and meet customer expectations. Responsible for assembling project plans and teamwork assignments, directing and monitoring work efforts on a daily basis, identifying resource needs, performing quality review; and escalating functional, quality, timeline issues appropriately. Responsible for tracking key project milestones and adjusting project plans and/or resources to meet the needs of customers. Coordinates communication with all areas of the enterprise that impacts the scope, budget, risk and resources of the work effort being managed. Assists Program Manager(s) in partnering with senior management of the business community to identify and prioritize opportunities for utilizing IT to achieve the goals of the enterprise. Must possess extensive knowledge and expertise in the use of project management methodologies and tools, resource management practices and change management techniques. This is a management role with human resource management responsibilities (e.g., hiring, performance management). Manages one or more cross-functional projects of medium to high complexity. More senior role has responsibility for multiple large, complex projects with greater impact to the enterprise.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience. Project Management certification or successful completion of a recognized project management curriculum is required.

##### **Experience:**

A minimum of 7 years of IT work experience, including 4 or more years managing projects. Experience with projects in multiple technologies and functions.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Responsible for the management of one or more medium to large-sized, moderately to highly complex projects. Typically manages and mentors project leaders and project management staff.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Project Leader**

**Job#: 8230**

#### **General Characteristics**

Responsible for overall coordination, status reporting and stability of project oriented work efforts. Establishes and implements project management processes and methodologies for the IT community to ensure projects are delivered on time, within budget, adhere to high quality standards and meet customer expectations. Responsible for assembling project plans and teamwork assignments, directing and monitoring work efforts on a daily basis, identifying resource needs, performing quality review; and escalating functional, quality, timeline issues appropriately. Responsible for tracking key project milestones and adjusting project plans and/or resources to meet the needs of customers. Coordinates communication with all areas of the enterprise that impacts the scope, budget, risk, and resources of the work effort being managed. Assists Project Manager(s) and/or Program Manager(s) in identifying and prioritizing opportunities for utilizing IT to achieve the goals of the enterprise. Must possess advanced knowledge and proficiency in the use of project management methodologies and tools, resource management practices and change management techniques. This is an individual contributor role without human resource management responsibilities (e.g., hiring, performance management). Manages one or more projects of medium to high complexity. More senior role has responsibility for large, complex, cross-functional or multiple projects with greater impact to the enterprise.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of IT work experience, including 2 or more years managing projects.

##### **Complexity:**

Intermediate professional level role. Responsible for the management of one or more small to medium-sized, moderately complex projects. Leads, assigns and tracks results for a project team under general direction of project/program managers.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Project Management Specialist**

**Job# 8235**

#### **General Characteristics**

Designs, implements, evaluates and audits project management processes and templates for the project management office (PMO). Compiles metrics relating to IT project success, project attributes, and individual productivity and adherence to defined processes. May track costs and performance, service levels and other metrics required to ensure project goals and objectives are met. Serves as a resource to project managers and project leaders to educate and assist them with implementing project management processes and making improvement/changes. Provides administrative support to project managers and project leaders. Ensures project control systems are in place and integrates project data for decision makers. Administers and maintains project management software and tools (e.g., Microsoft Project Server). Organizes and publishes project-related documentation in various sources. Knowledge of project management tools, methods and best practices such as those defined by the Project Management Body of Knowledge (PMBOK).

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 3 years of project support/management experience.

##### **Complexity:**

Intermediate professional level role. Works independently or on a team. Performs tasks of moderate to high complexity that require increased knowledge of multiple technical environments and knowledge of business areas that IT supports. May coach more junior staff.



## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: PROGRAM MANAGEMENT

**Job Title: Resource Manager**

**Job#: 8240**

#### **General Characteristics**

Manages the coordination of human resource needs for IT projects. Develops the systems and processes to ensure that business, project and employee needs are met in the assignment of staff to projects. Responsible for developing and managing an employee skills assessment process, forecasting skill and staff needs based on project plans. Develops and manages a staff utilization process, ensuring that staff resources are fairly and evenly distributed and that staff are not over utilized across projects.

Works with IT leadership, IT Staffing Manager and Training Manager in the forecasting of staff needs and skills, to ensure proper recruitment, training and development of staff to meet current and future IT needs. Coordinates the training and development of staff. Continually communicates with both project managers and assigned staff to ensure needs of both are being met, and to continue to improve staff selection and coordination of resources. Acts as the mentor and champion of training and career development processes for assigned staff. Ensures that performance appraisals occur upon completion of projects and that skills are updated. Coordinates and assimilates the performance appraisal information across projects resulting in a cohesive annual appraisal of staff who support a number of projects.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, Education, or other related field. Or equivalent work experience.

##### **Experience:**

7 years of IT work experience including managing team(s) responsible for staffing, training and development and resource management.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex issues/projects as a technical leader and the subject matter expert. Frequently reports to a corporate human resource executive, Chief Information Officer, IT Chief Operating Officer, Chief Technology Officer or Director, Program Management.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: CUSTOMER SERVICE HOTLINE**

**Job Title: Manager, Customer Service Hotline**

**Job#: 8400**

#### **General Characteristics**

Directs the Customer Service's hotline and order processing services for an enterprise. Responsible for business strategy and planning to ensure the organization has the appropriate resources, budget, tools and customer satisfaction metrics needed to provide the highest level of customer service.

Establishes quality standards and performance metrics for customer service's hotline performance. Manages the design and implementation of knowledge based systems, ensures appropriate resources are available to respond to customer inquiries/issues. Develops and implements learning strategy to maintain knowledge and provide growth for representatives. Resolves complex customer issues.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of related IT and business work experience in customer support and service functions. Experience with managing teams and projects in multiple technological and business environments.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex issues/projects as a technical leader and a subject matter expert. Frequently reports to a Chief Information Officer, IT Chief Operating Officer, E-Business Executive or Departmental IT Executive.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: CUSTOMER SERVICE HOTLINE**

**Job Title: Customer Service Hotline Representative**

**Job#: 8410**

#### **General Characteristics**

Responsible for responding to inquiries and providing information to customers calling into a service hotline. Records all customer contact information in a call log. Evaluates situation, determines appropriate response and escalates to designated specialist/resource for resolution of customer's problem or complaint. Tracks issues escalated for resolution to ensure customer receives a timely response. Must have knowledge of the enterprise's business/products and demonstrate strong customer focused skills.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 2 years of related work experience.

##### **Complexity:**

Learner/entry level role. Provides customer hotline services of low to medium complexity. Functions, somewhat independently, under general direction of more senior customer service representatives, supervisors or managers. Generally follows documented procedures and checklists.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: TECHNICAL PRODUCT SUPPORT

**Job Title: Manager, Technical Product Support**

**Job#: 8600**

#### **General Characteristics**

Develops business strategy and provides direction for technical product support function. Manages a team responsible for resolving customer technical problems with enterprise's products, developing the technical related responses for Requests for Quotes (RFQs), working with sales team to address technical product issues, and delivering and installing new software releases to customers and providing post-sales technical product support to customers.

Responsible for managing the technical interface to customers, including RFQ specification reviews, hands-on testing and modeling and interfacing with development and engineering for systems design work at customer sites. Responsible for building and maintaining relationships that can be leveraged to support the achievement of business objectives.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, Business Administration, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 7 years of high-tech industry and/or IT work experience in product engineering, development and support functions. Experience with managing teams and projects in multiple technological and business environments.

##### **Breadth:**

Middle level management. Works under general direction of senior level management. Typically manages and mentors supervisors, project leads and/or technical staff. Works on multiple, complex issues/projects as a technical leader and the subject matter expert. Frequently reports to a corporate senior level software development executive, research and development executive, sales executive or Chief Technology Officer.

## JOB FAMILY DESCRIPTIONS

### JOB FAMILY: TECHNICAL PRODUCT SUPPORT

**Job Title: Technical Product Support Analyst**

**Job#: 8610**

#### **General Characteristics**

Responsible for providing post-sales technical product support. This includes, but is not limited to, analyzing customers' business needs and developing technical requirements, preparing technical responses to Requests for Quotes (RFQs), configuring integrated solutions to meet customer needs and implementing client solutions. May act as a primary point of contact between customer's technical staff and the enterprise's development/engineering organization. Serves as technical consultant to the sales team and must have a broad knowledge of multiple computer environments, platforms and technologies and in-depth knowledge of the enterprise's products.

#### **Dimensions**

##### **Education:**

Bachelor's Degree in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 4 years of high-tech industry and/or IT work experience in product engineering, development and/or support functions.

##### **Complexity:**

Intermediate professional level role. Works independently or on multiple projects as a project team member, occasionally as a project leader. Works on small to large, complex issues/projects that require increased skill in multiple technical environments and knowledge of one or more specific technical products. May coach more junior staff.

## **JOB FAMILY DESCRIPTIONS**

### **JOB FAMILY: TECHNICAL PRODUCT SUPPORT**

**Job Title: Technical Product Support Specialist**

**Job#: 8620**

#### **General Characteristics**

Responsible for providing post-sales technical product support. This includes, but is not limited to coordinating the resolution of customer problems, maintaining and installing applications/solutions, performing bug verification, release testing and beta support for one or more products. May work at the customer site to design and install applications. Must have knowledge of one or more of the enterprise's products and familiarity of multiple applications.

#### **Dimensions**

##### **Education:**

Associate's or Bachelor's Degree or technical institute degree/certificate in Computer Science, Information Systems, or other related field. Or equivalent work experience.

##### **Experience:**

A minimum of 1 year of related high-tech industry and/or IT work experience.

##### **Complexity:**

Learner/entry level role. Provides technical product support to one or more product(s) of low to medium complexity. Functions, somewhat independently, under general direction of more senior technical product support staff, supervisors or managers. Generally follows documented procedures and checklists.



September 8, 2021

Joel Atkinson  
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Dear Joel:

RSM US LLP (RSM) is pleased to share our qualifications for information technology staff augmentation services as outlined in the Invitation to Bid No. 21-80101507-ITB and to build a partnership with the Department of Management Services (the Department). We fully understand the services to be provided and are committed to continuing to work with the Department to effectively deliver quality service, manage fees and exceed your expectations.

As a national public accounting firm, RSM understands the challenges, complexity and nuances of the services requested. We have assembled a capable, consistent team of professionals that is well qualified to work with you to help you accomplish your goals.

We trace our history to 1926 and is the fifth largest audit, tax, and consulting firm in the United States. Structured as a limited liability partnership, RSM has nearly 800 partners and principals and over 13,000 professionals. RSM has nine offices in Florida and considers the public sector one of the primary industry sectors for our growing Florida practice. The public sector is the largest industry we serve in Florida, with more than 70 state and local government clients, including the State of Florida and the Department. We have the resources and experience necessary to provide the services requested.

Within the pages of this proposal, you will be introduced to our combined experience with technology, management and risk consulting services across multiple federal and state programs, including several right here in Florida. Additionally, you will find our approach and examples of the variety of tools that we have at our disposal to build a robust infrastructure for routine, straightforward and transparent program management. We encourage you to not just take our word for it, but to seek the advice of our references, for whom we have performed similar services for years.

We are fully committed to your success and understand the importance of the program and the criticality of timeliness. Once you have had the opportunity to review this proposal, we would be pleased to discuss further. Please feel free to contact us with any questions.

**THE POWER OF BEING UNDERSTOOD**  
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Joel Atkinson  
Purchasing Analyst, Division of State Purchasing  
Florida Department of Management Services  
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Sincerely,



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# PROPOSAL TO PROVIDE IT MANAGEMENT SERVICES

Department of Management Services,  
The State of Florida

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## EXECUTIVE SUMMARY

### 1. Provide a brief executive summary.

RSM has extensive experience and talent in the area of building and deploying web-based applications, including both RESTful and SOAP web services. Our current development direction is to employ the new .Net Core open source framework to support deployment in multiple operating environments. We have the experience in pure Web applications, but our primary experience is in Microsoft Dynamics 365. RSM has had extensive development and delivery experience in state and local government including the development of Intellectual Property for Care Management of Social Services. In this complex area we have developed a robust solution that includes forms, business process automation, workflows, customer integration code, reporting and portals for provider and customer.

In the public sector RSM has focused our efforts on the Health and Human Services (HHS) sector. This has allowed us to become thought leaders in the person centered approach to care management as well as further develop our IP and methodologies for successful deployments. Although the bulk of our experience is in HHS, RSM has taken on other CRM solutions that include many of the workings of public sector that are transferable to a COTS solution that has a browser front end, mobile application and portal for customer and provider. We would like to further acquaint you with our experience around the HHS space and the complex CRM work we have done for other clients.



RSM started in the HHS field with CRM in 2012 with a project in New Jersey. Since then we have continued to grow in scope and industry expertise in Person Centered Care. The Person Centered process allows services to be aligned with an individual's goals. This outcome-based process is what our solution is built around. We value the person and his/her needs as we evaluate the persons' eligibility and plan the services for them. This outcome-based process is implemented throughout the solution, providing counties and states a way to facilitate the business process within an electronic system.

### Microsoft Gold Certified Partner

We support Microsoft's offering of CRM both online and on-premises. We can assist organizations in assessing the relative benefits of (1) total cost of ownership (TCO) for online services versus using cloud-based offerings; (2) integration with Microsoft Outlook while leveraging the existing Microsoft technology stack, such as SharePoint and SQL Server; and (3) assess data privacy and real-time integration issues associated with the cloud.



RSM became a Microsoft Partner in 1984 and are currently the third largest U.S. reseller of Microsoft Dynamics products. We have worked with Microsoft Dynamics since Version 1.0. We offer a wide range of services and support for the entire Microsoft ecosystem. This commitment allows us to construct solutions for our clients using the entire product suite of Microsoft applications.

Microsoft has honored RSM with several awards, including the following:



#### **Gold Certified Partner of Microsoft Dynamics Business Solutions**

As a Gold Certified Partner, RSM has demonstrated the highest level of competence and expertise with Microsoft technologies while maintaining a close working relationship with Microsoft.

#### **Inner Circle for Microsoft Dynamics**

RSM has been recognized as one of the top one percent of Microsoft Dynamics Partners in the United States.



#### **President's Club for Microsoft Dynamics**

RSM was awarded membership in the President's Club for our exceptional sales record and business success.

#### **Strong Microsoft Dynamics™ CRM and SharePoint Professionals**

RSM has over 1,500 active Microsoft clients. We have built a strong national Dynamics consulting practice, with over 125 consultants. Our national development and integration practices are focused on Microsoft technologies, with high levels of certifications. We cover customer relationship management as well as ERP functions like financials, distribution, manufacturing, human resources and payroll, field service, project accounting and business portals.

Our Microsoft Dynamics CRM solutions range from basic "out-of-the-box" models to complex architectures featuring automation, dashboards, system integration and custom development. We integrate CRM with the entire Microsoft Dynamics suite as well as other business systems. Our consultants average 15+ years of CRM experience and specialize in multiple industries.

#### **Extensive local service capabilities**

RSM serves over 2,800 public sector clients, including more than 700 government clients. We provide local service teams and resources specializing in the public sector.

- Award-winning solution
- Proven implementation methodology
- Microsoft Certified Professionals with current certifications
- For more than 30 years, our consultants have implemented over 2,000 Microsoft Dynamics solutions
- Nearly 600 technology professionals serving clients throughout the United States
- To learn more, please visit [rsmus.com/hhs](http://rsmus.com/hhs)

#### **Strategy and management consulting**

RSM's strategy and management consulting practice consultants are passionate about innovating to drive business growth. Our collaborative approach incorporates industry and functional expertise with a focus on intelligent automation to optimize and enhance the efficiency of all your business operations, enabling you to accelerate your future.



We provide comprehensive solutions for business transformation and improvement, including finance and accounting, technology and digital, human capital, supply chain, customer experience and industry operations. We also have robust strategy execution services to empower your organization to achieve and exceed its goals.

### **Strategy execution**

RSM's strategy execution practice is focused helping clients develop and execute their strategic vision. Delivered through RSM's Delivery Excellence Center (DEC), our experienced consultants will guide through transformations both big and small. In addition to other tasks, we help build expansion strategies, drive change within the organization, evaluate the impact of business decisions, and navigate the merger and acquisition process.

### **Business transformation and improvement**

RSM's business transformation and improvement practice helps critically evaluate your business and refine and execute your tactics to meet your business objectives and drive efficiency. We help our clients take an impartial look at operating models across business functions to define the steps necessary to automate and enhance business processes to accelerate innovation.

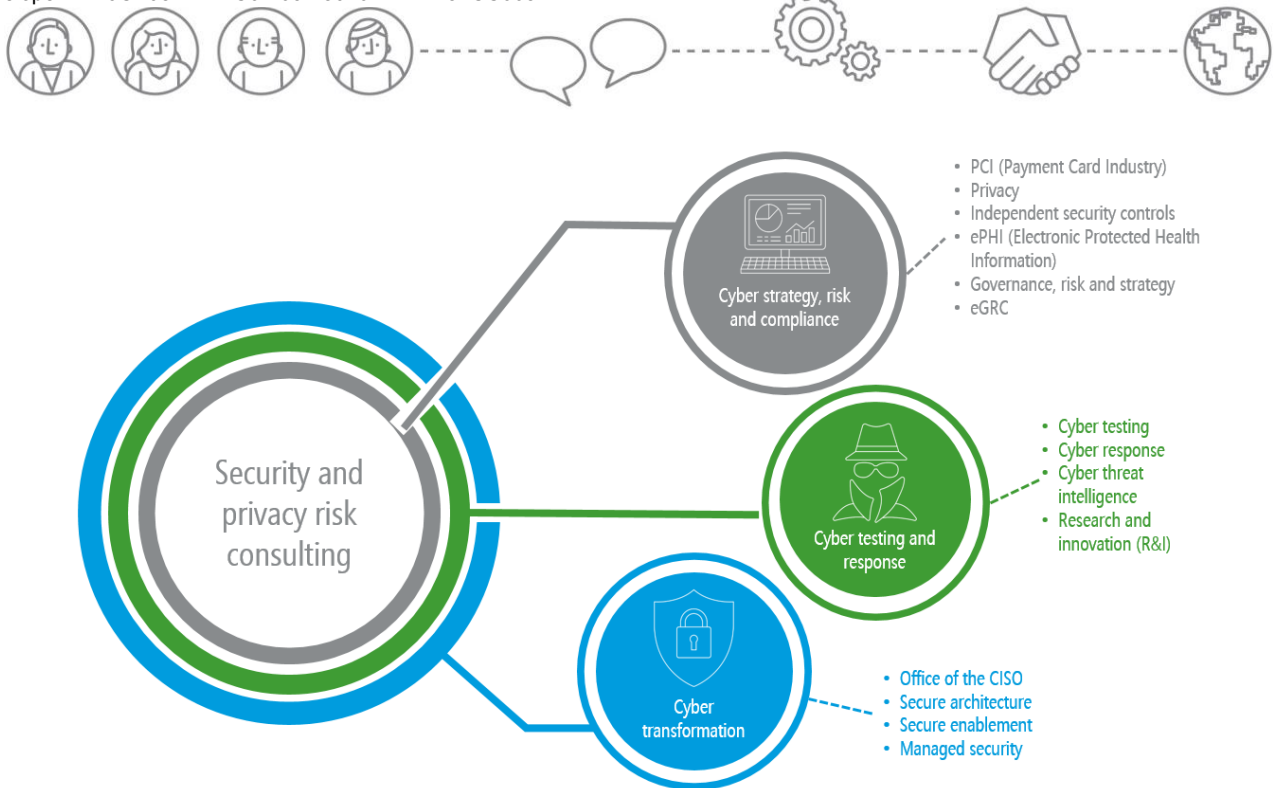
Our business transformation and improvement services focus on future-proofing the business. Whether you are looking to transform your business across multiple departments, or looking for support to enhance a specific business function, our team can provide the industry and functional experience you need and deliver a rapid return on your investment.

RSM's management consulting capabilities include the following:

- Strategy and assessments
- Program and project management
- CFO advisory and analytical services for finance and accounting
- COO advisory and analytical services for operations, cost management, supply chain and procurement
- CIO advisory and analytical services for technology and digital transformation strategy
- Human capital and workforce management
- Business process reengineering, automation and artificial intelligence
- Organizational change management
- Social and economic impact assessments
- Software selection

### **RSM's security and privacy risk consulting practice**

RSM is a national leader in providing cybersecurity assessment services to clients in a variety of organizational sizes and structures. Our security, privacy, and risk consulting services (SPR) encompass governance, technical, and implementation-based services. Many of the consultants in our SPR practice are certified white hat hackers who can identify your organization's highest strategic risks. After detailed assessments using proven techniques, we help you design or strengthen your system controls, and revise your policies and procedures surrounding access, segregation of duties, monitoring procedures and more.



Our proven approach to security assessments helps you identify and implement the right level of controls to align with your business goals and protect your sensitive data. Across each of the main risk areas—oversight, people, process and technology—we work with you to identify your risks, protect against the threats those risks pose, detect tactical and strategic issues, create a response plan and develop effective strategies to help you recover if you suffer an attack.

### IT audit experience in the public sector

Knowing that high-quality service comes from understanding the challenges our clients face, RSM has assembled a team of internal audit professionals experienced in serving the public sector industry who will access our proven industry materials, to provide you with a customized service approach. Given our commitment to public sector industry companies and our specific experience serving organizations like the Department, we are positioned to customize our IT internal audit approach to reflect the unique nuances of your environment—supporting efficiency while minimizing disruption, sharing insights and providing deeper value by understanding your unique challenges and opportunities.

### Attuned to industry developments

We leverage a variety of means to keep our public sector personnel well-versed on issues affecting you. Among these, we maintain relationships with many federal and state departments and agencies, as well as working relationships with officials within the U.S. Government Accountability Office and the Office of Management and Budget.

We have participated as an advisor to the President’s Council on Integrity and Efficiency through the Quality of Audit Roundtable. Our firm also serves on the AICPA’s State and Local Government Expert Panel. The Department’s proposed engagement team consists of public sector industry professionals who continually partake in specialized industry training, in order to provide pragmatic solutions to you. Many of our partners and principals sit on regulatory and industry affiliated boards, allowing us to have first-hand knowledge of proposed developments affecting the public sector. Therefore, we understand your industry, your unique considerations and can provide fresh perspective for your questions and needs.



### **A methodology and client service that revolves around you**

Realizing that each organization has unique challenges and needs, we developed a methodology that allows us to tailor and scale our approach to what is beneficial for the Department. This customization gives us a deeper understanding of your issues and a more responsive approach as to how to address them.

We are more than just control testers. Our auditors do not simply execute against a script and tell you in a binary manner whether a control is working or not. Our professionals go beyond the basics and determine the reasons controls are not working, and we provide insights to enhance your control environment and process efficiencies. We will identify process and control improvement opportunities by establishing a deep understanding of the Department's objectives and the processes designed to meet them. Your team will find the root cause of issues through our thorough understanding of your business and by leveraging what we have learned through our public sector industry experience. Our resulting recommendations for improvement will consider the Department's unique circumstances with an end goal of reducing risk and improving performance.

Additionally, through our extensive experience serving clients similar to the Department, we have the qualifications and means to provide meaningful analysis of your business metrics, assess your IT control environment and help ensure compliance with pertinent regulatory requirements.

However, advice is not the only measurement of value. You can measure the difference in our methodology by the number of improvements that we recommend and suggest, as well as which ones you choose to implement. In the long term, you can also measure the improvement contributions to the overall health of your organization. We will provide the Department with a customized approach, experienced professionals and unique insights, helping to identify the most effective solutions for you.



2. Provide a list of entities the Vendor provides or has provided IT Staff Augmentation services to, and the Vendor's IT Staff focus (if any). Bidder should respond to the questions asked by including information that the Bidder determines is the best representation of Bidder's current IT Staff Augmentation services offerings.

Reference 1—Technology consulting	
<b>Entity name</b>	State of Hawaii Department of Health, Behavioral Health Administration
<b>Entity address</b>	3627 Kilauea Ave, Suite 101 Honolulu, HI 96816
<b>Contract number/purchase order number assigned by the entity</b>	ASO Log No. 17-216
<b>Original term of the contract/purchase order</b>	Six years
<b>Contract/purchase order start date</b>	May 2017
<b>Duration of each contract/purchase order (time to complete the work)</b>	The original contract has yearly budget Mods that need to be executed against encumbered funds. There have been times where they have opted for a six month period but there is always a Mod that is executed on the yearly budget cycle. Deliverables within the Mod are scheduled to take place during the Mod dates.
<b>Total or approximate dollar amount contracted or received</b>	\$13.3 million
<b>The number of staff assigned for the contract or purchase order</b>	We have supplied 30 consultants over the past 5+ years at different times with 15 being the max at any one time.
<b>Type of tasks performed by assigned staff</b>	<ul style="list-style-type: none"> <li>• Business analysis</li> <li>• Project management</li> <li>• Portal development</li> <li>• Microsoft dynamics configuration</li> <li>• Data migration</li> <li>• System integration</li> <li>• System design and architecture</li> <li>• System testing</li> <li>• Microsoft dynamics development</li> <li>• Business intelligence</li> <li>• Data design and semantic layer deployment</li> </ul>
<b>Stipulate if you were the primary contractor or hired as a subcontractor by the prime and list name of prime</b>	RSM is the prime and we have had a few subcontract employees engaged.





### Reference 2—Management consulting

<b>Entity name</b>	Rural Utilities Services, United States Department of Agriculture
<b>Entity address</b>	1400 Independence Ave., S.W. STOP 0506 Washington, DC 20250
<b>Contract number/purchase order number assigned by the entity</b>	Contract GS00Q14OADS103 / PO 12C0BA19F0342
<b>Original term of the contract/purchase order</b>	July 2019 through December 2021
<b>Contract/purchase order start date</b>	July 22, 2019
<b>Duration of each contract/purchase order (time to complete the work)</b>	12 months
<b>Total or approximate dollar amount contracted or received</b>	Approximately \$1,080,000 paid to prime contractor
<b>The number of staff assigned for the contract or purchase order</b>	5-6 worked on the contract
<b>Type of tasks performed by assigned staff</b>	<ul style="list-style-type: none"> <li>• Program and project management services</li> </ul>
<b>Stipulate if you were the primary contractor or hired as a subcontractor by the prime and list name of prime</b>	RSM was subcontractor to AMYX, Inc.

### Reference 3—Security and privacy risk consulting

<b>Entity name</b>	The City of Sacramento
<b>Entity address</b>	915 I Street, 3rd Floor Sacramento, CA 95814
<b>Contract number/purchase order number assigned by the entity</b>	Contract No. 2015-1637
<b>Original term of the contract/purchase order</b>	June 2017 through June 2024
<b>Contract/purchase order state date</b>	June 2017
<b>Duration of each contract/purchase order (time to complete the work)</b>	12 months
<b>Total or approximate dollar amount contracted or received</b>	\$543,830 paid to RSM
<b>The number of staff assigned for the contract or purchase order</b>	5 to 6 work on the contract
<b>Type of tasks performed by assigned staff</b>	<ul style="list-style-type: none"> <li>• Enterprise internal, external and application penetration testing</li> <li>• RSM has been the city's qualified PCI security assessor for three years</li> </ul>

**Reference 3—Security and privacy risk consulting**

**Stipulate if you were the primary contractor or hired as a subcontractor by the prime and list name of prime**

This was a sole source contract awarded to RSM.

**Reference 4—Technology risk consulting**

<b>Entity name</b>	Department of Children and Families, the State of Florida
<b>Entity address</b>	BLDG 5 RM 302 1317 Winewood Blvd Tallahassee, FL 32399
<b>Contract number/purchase order number assigned by the entity</b>	PR11267600
<b>Original term of the contract/purchase order</b>	March 2, 2020 through June 30, 2020
<b>Contract/purchase order start date</b>	March 28, 2020
<b>Duration of each contract/purchase order (time to complete the work)</b>	Two months
<b>Total or approximate dollar amount contracted or received</b>	\$75,000
<b>The number of staff assigned for the contract or purchase order</b>	Six people
<b>Type of tasks performed by assigned staff</b>	<ul style="list-style-type: none"> <li>Annual security and privacy attestation report</li> </ul>
<b>Stipulate if you were the primary contractor or hired as a subcontractor by the prime and list name of prime</b>	Prime



## EMPLOYMENT PROCEDURES

### *3. Provide an overview of the Vendor's process for selecting and providing candidates for IT Staff Augmentation Services.*

RSM hires employees for long-term career positions where culture and skill sets are a match to our firm. All consultants that we would have available for staff augmentation also serve as our project based staff on other client engagements and therefore need to be able to execute to the enterprise rigor that we exercise on all of our projects. We do not have a specific pool of employees that are targeted to staff augmentation and therefore all the answers in this proposal are represented as the practices that we employ for all our consultants.

Our primary consideration for staffing a consultant at a client is industry followed by technical. As all of our consultants are technically proficient, we have found that the understanding of the client business is critical for a good fit. The next consideration is the experience of the consultant and the client maturity. If the client project or team is not mature then we need a more experienced consultant to be able to handle the ad hoc nature of the client. With clients that are more mature we can have less experienced consultants perform the function to a very high level.

Geography has been a selection criteria that has become less of an issue over the last two years as the pandemic as forced the client base into a remote work setting. We still value in person work when practical and where that in person component has value attached. We have consultants located across the US including Florida and if in person time is of value and scheduled then it would make sense to consider geography in the selection.

### *4. Describe the Vendor's Operational Formula to ensure staffing availability for IT Staff Augmentation services.*

RSM's technology consulting division has seen very strong growth over the past eight years. To provide the talent in this growth phase we have developed a pipeline for talent that starts with college hires and includes strategic experienced hires. This year's new hire class is over 100 and provides RSM with the talent pool to fuel our growth. Additionally we have over 50 experienced hires that have specific industry and technical skills to enhance our leverage model with our college hires. This pipeline and leverage model provides RSM with a pool of talent to meet our client's needs. This talent pool is all U.S.-based.

### *5. Describe the Vendor's interview screening standards for identifying candidates for IT Staff Augmentation Services, including how the Vendor ensures that candidates meet or exceed the standards for the Job Titles within Contract Exhibit J, Job Family Descriptions, and Request for Quote criteria (post Contract execution).*

RSM screens all talent based on our internal hiring guidelines, which exceeds the states requirements. Our candidates are screened for many attributes beyond the technical items outlined in the job title that include diversity, critical thinking, culture acclimation, communication skills, curiosity and teamwork. These along with the technical credentials allows us to exceed the needs of the state and the job positions. These consultants also are used to execute on our client projects that are not staff augmentation where they are accountable to our enterprise rigor of project execution.



*6. Describe the Vendor's process for selecting and interviewing candidates for IT Staff Augmentation Services.*

RSM does not interview specifically for staff augmentation services. We interview our candidates for all possible client engagements. We would select consultants that are already RSM employees for a staff augmentation engagement based on industry, skill set, experience and geography. All consultants that we would propose the state use would already be RSM full-time employees and not hired for the singular purpose of working as staff augmentation.

*7. Describe how the Vendor evaluates candidates for IT Staff Augmentation Services, including but not limited to, an evaluation of pertinent knowledge, skill, and ability.*

RSM evaluates our consultants for placement on client engagements, including staff augmentation, with a bias for industry. We would look at the specific agency and look within our consulting ranks for consultants that have specific experience with similar clients. Then we would evaluate the technical skill set needed to help ensure that our consultant exceeds the outlined skills before assessing availability. It may be that the right consultant is not available but we could do some shifting of resources to free that consultant up for the assignment. We leave open the availability as the last match since that is a variable that we can control across all the client work that exists within the firm.

*8. Provide the Vendor's interview criteria for candidates for IT Staff Augmentation Services.*

RSM does not have specific criteria for staff augmentation as we hire our consultants for all possible client engagements. Our criteria starts with diversity. We understand that a diverse workforce is more effective than one that is not. We have a [Culture, Diversity and Inclusion](#) (CDI) initiative at our firm that is very strong, and multiple employee network groups assist in recruitment of a diverse candidate pool. We then hire the best-qualified person for the position from within that diverse pool of candidates. Our criteria is centered around cultural fit to our firm, technical skills, experience, communication skills, curiosity and critical thinking. This criteria is then balanced with the specific needs of the practice like development, business analysis or project management for example. This criteria is managed by our HR team with training for all hiring managers.

*9. Describe how the Vendor validates the information contained within resumes, including but not limited to, the validation of education, experience, licensure, and certification.*

Please refer to [question 15](#) for detailed information on our background check process, including education and licensure requirements. Certifications for our Microsoft practice are available to us as a gold partner which are validated during the interview process through the Microsoft partner portal. Other items within the resume we will contextual checks to help ensure that the item in the resume is something that the candidate has knowledge of during the interview process. Since our consultants do not work exclusively on staff augmentation we would become aware of any falsification on a resume as they work on our projects with our senior level staff.

*10. Describe how the Vendor conducts reference checks.*

Reference checks are done at the discretion of the hiring manager. Our background check ([question 15](#)) includes employment verification.



*11. Describe how the Vendor will implement and administer the distribution and completion of the required Resume Self-Certification Form (Contract Exhibit F) for candidates.*

The resource management team that is responsible for onboarding all consultants to projects will include this as part of the documentation for this contract. Our internal systems have mechanisms in place for each customer contract that include checklists for any work to begin or consultant to be assigned. This includes invoicing, security training, additional background checks and other items like the Resume Self-Certification Form.

*12. Describe how the Vendor determines whether a qualified candidate is suitable for a Customer.*

The principal in charge of the client conducts investigational meetings with the stakeholders and assess the nature of the engagement and the experience and skill set needed for the engagement. That information is then used with the resourcing team to identify the consultants that would be best for the engagement. Processes described earlier are then used to select the correct consultant and assign to the engagement.

*13. Describe the Vendor's procedures for addressing and remedying performance issues for Staff placed pursuant to a request for quote.*

The principal on the engagement handles all performance issues raised by the client. Communication is conducted to identify the specific and general items that are of issue and if they cannot be resolved swiftly with minimal involvement from the client then the consultant is replaced with another resource that is approved by the client. As this is a people business these issues come up and we are skilled at handling them.

*14. Describe the Vendor's ability to ensure its employees, subcontractors, and Staff protect information deemed as confidential or trade secret.*

All RSM employees have mandatory training data privacy, security and trade secrets. This training is conducted multiple times a year. In addition to this training anything that is specific to a client is part of the onboarding materials that are used for all consultants that are used on the engagement. RSM has a delivery assurance process internally that reviews all projects that have these type of requirements which adds additional oversight.

*15. Describe the Vendor's background screening procedures, including any enhanced screenings available when a Customer has designated a job as a job of special trust (Level 2), pursuant to Chapter 435, F.S., which requires enhanced background screening.*

The firm conducts background checks (including credit checks for certain specified, applicable positions) on all employees (including college interns and seasonal/temporary employees), direct admit or acquired partners/principals, rehires (gone longer than six months), and employees promoted into partner/principals. The only exception to mandatory background checks are high school students who are interning or assisting with short-term projects.

The firm will not initiate a background check before giving a conditional offer of employment to an applicant unless it is for wealth management. Wealth management may request background checks and credit checks prior to a conditional offer on candidates selected to proceed in their defined hiring process.



Employment, partnership and certain promotions are contingent upon a successful completion of the reference and background check. Employees/partners do not begin work until results from all parts of these checks have been received, completed, reviewed, and meet required standards. Human resources are solely responsible for the review and approval of results, and address applicable concerns which may include a) falsifications, misrepresentations, and omissions, b) criminal convictions, c) driving history concerns, and sometimes d) credit reports. An offer may be rescinded based on results that do not meet our criteria.

Many of our professional staff have been fingerprinted for Level 2 screenings as a result of work performed for the State. As desired by each customer agency in their statements of work, we will obtain Level 2 background checks prior to commencing work.

Other areas we screen include the following:

- Social security trace
- Education verification
- Employment verification
- Multi-Jurisdictional Index Search
- Professional license verification—i.e. CPA, etc.
- County and federal criminal misdemeanor and felony conviction report
- Driver's history—MVR
- Financial Administrative Action Report (FDIC, FRB, NCUA, OCC, OTS, FINRA, NFR, and SEC)



## PRINCIPAL PERSONNEL

16. List the Vendor's Principal Personnel who will make decisions concerning Staff placement for services and include the following for each Principal Personnel member:

- **Name:** Phillip Haase
- **Education:** Bachelor of Science, Miami University, Ohio

*Credentials and certifications*

- **Job title:** Principal, Technology Consulting, Public Sector Practice Lead
- **Years of IT Experience:** 35 years
- **Number of years employed with the Vendor:** More than eight years

17. Describe the role each Principal Personnel will have in the Contract.

Phillip Haase oversees the Public Sector Technology Practice for RSM at a national level. As an owner he has authority and accountability for client engagements in the public sector. Phillip will be overseeing each request for quote.

18. Describe each Principal Personnel's staffing resource management role in past IT Staff Augmentation contracts.

Phillip has been the principal in the response of state and municipal contracts at Ohio, Los Angeles County, Vermont and others. In addition to being the principal in the contract acquisition he has also overseen the staff assignment and customer satisfaction on those engagements.

19. Detail any unique expertise and capabilities each Principal Personnel possess that could bring additional value to a Customer.

Phillip is a Principal in Technology Consulting and is the lead for RSM's National CRM Public Sector Practice out of the Columbus, Ohio office. In his current role Phillip works with clients at the state and local level around Health and Human Services agencies to facilitate person centered, outcome based service delivery thru systems that support a single or multiple agency approach. Phillip has over 35 years in the IT industry and the last 20 years in the international CRM market across many industries including public sector, manufacturing, finance, insurance, retail and professional services. Phillip also has developed RSM's Disease Management Global Practice over the last four years, focused on Department of Health needs for integrated disease management systems built to cooperate with social services systems to promote whole person care. Phillip's representative experience includes the following:

- Designed solution for Person Centered Case Management in the Developmental Disabilities agency for Ohio which won national awards at Microsoft
- Oversee practice focused on Public Sector client agencies of Social Services, Behavior Health, Mental Health and Health Department
- Designed solution for Multi Agency Case Management at Indiana Family and Social Services Administration combining the business process of four agencies into a single solution.
- Participate in strategy sessions with state and county customers around Medicaid management and service delivery trends
- Manages RSM's Disease Management Global Practice

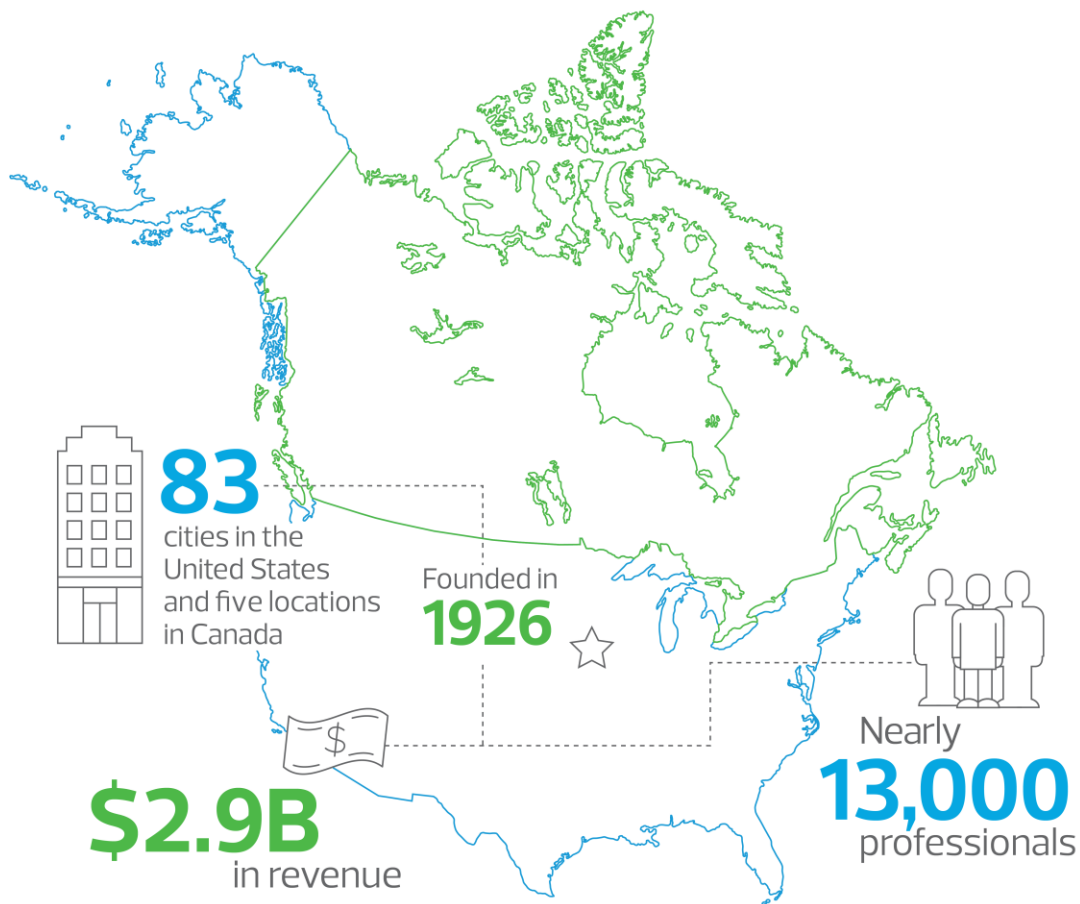


## APPENDICES

### Appendix A—About RSM

RSM's purpose is to deliver the power of being understood<sup>®</sup> to our clients, colleagues and communities through world-class audit, tax and consulting services focused on middle market businesses. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today's ever-changing business environment.

RSM is the leading provider of audit, tax and consulting services focused on the middle market, with nearly 13,000 professionals in 83 U.S. cities and five locations in Canada. It is a licensed CPA firm and the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with 48,000 people in more than 120 countries. RSM uses its deep understanding of the needs and aspirations of clients to help them succeed.







## Appendix B—Culture, diversity and inclusion at RSM

RSM is a thought leader in the profession concerning the imperatives of culture, diversity and inclusion (CDI). At RSM, CDI defines how we thrive—not only because it’s part of our values, but because it’s how we foster an inclusive workforce, help the middle market address an ever-changing world and generate better business results for our clients and our firm. Internally, RSM invests over \$3 million annually, including nine full-time resources and over 200 professionals serving dual roles executing our CDI programming. The CDI focus at RSM spans four strategic pillars:

1. **Workforce.** The recruitment, advancement and retention of underrepresented women and minorities and the inclusive talent experience for all professionals is an imperative for RSM. The firm funds 12 employee network groups (ENGs) to address the needs of our diverse talent population and, by extension, to increase cultural competency in our client service.
2. **Workplace.** Our enterprise-wide Inclusion Council, which is comprised of our chief executive officer and other executive leaders, ensures CDI is a funded and strategic priority. RSM further ensures that CDI has impact and drives inclusion into our policies and the fabric of our business. CDI collaborates with our human resources, recruiting and professional development teams as well as audit, tax and consulting teams.
3. **Marketplace.** RSM supports diverse suppliers and organizations across the profession, including the National Association of Black Accountants (NABA), Association of Latino Professionals for America (ALPFA), Ascend, Student Veterans of America (SVA) and AICPA Women’s Leadership. Through initiatives such as the Middle Market Collaborative for Understanding and publications such as Inclusion: An Evolving Mosaic—RSM’s Annual Diversity Report, and thought leadership on key inclusion subjects, RSM extends its culture, diversity and inclusion commitment to our marketplace partners.
4. **Community.** RSM’s CDI program provides support for nonprofit efforts and organizations in the communities where we do business. These efforts bridge the divide for the disadvantaged and facilitate opportunity for the workforce of the future. CDI corporate social responsibility includes scholarships, sponsorships and volunteerism with hundreds of charitable entities, associations, colleges and universities annually.



**[www.rsmus.com](http://www.rsmus.com)**

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party.

For more information, visit [rsmus.com/who-we-are](http://rsmus.com/who-we-are) for more information regarding RSM US LLP and RSM International.

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