**APPENDIX E: REQUIRED STAFF QUALIFICATION FORMS**

**To be submitted with the Technical Proposal**

**As part of the Technical Proposal, Firms MUST submit these forms and name consultants for the following positions:**

* Solution Architect (Form E.1)
* Solution Specialist (Form E.2)
* Senior Functional Analyst (Form E.3)
* Senior Technical Analyst (Form E.4)

Firms should only submit one (1) candidate for each title/Form E.1-E.4.

These forms will also be required to be submitted by the successful firm(s) during the term of the contract when firms need to propose additional staff under a Statement of Work (SOW).

**Consultants proposed for the Solution Architect and Solution Specialist titles MUST meet the minimum qualifications. Proposals putting forth any consultants for the Solution Architect and/or the Solution Specialist positions that do not meet the minimum qualifications for the position may result in the proposal being deemed non-responsive.**

**APPENDIX E.1: PROPOSED SOLUTION ARCHITECT**

**Using the chart below, describe in detail how the consultant meets the Minimum Requirements** (on what projects/systems/software/etc.) and **where, when and how long the consultant worked on the particular project**using the specified software/technology. Please provide **clear and accurate descriptions of the consultant’s experience for each Minimum Requirement.** Beyond the minimum qualifications, the State has identified additional desired qualifications that will be considered as part of the technical scoring of proposed staff. All experience related to these additional desired qualifications should be detailed on this form.

**NOTE:** Resumés should not be submitted. All supporting information must be included on this attachment.

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| **Solution Architect** | |
| **Name of Proposed Consultant:** | |
| **Minimum Qualifications:** | |
| **Qualification 1 (Minimum):** At least five years of experience providing strategic assessments, in the form of formal work products, to executive teams. The assessments must utilize Oracle PeopleSoft Financials solutions in the public sector. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 2 (Minimum):** At least five years of hands-on experience troubleshooting and resolving mission-critical issues related to PeopleSoft Financials in the public sector and reporting findings directly to executive teams (this experience should include projects where the proposed candidate was personally involved and applied their knowledge directly to help solve the issue(s). | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 3 (Minimum):** At least five years of experience in solution assessment, system design, security planning, system integration, information architecture, or business process engineering. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 4 (Minimum):** At least five years of experience with re-architecture efforts using PeopleSoft Financials version 9.2 in a public sector environment to align with the best practice use of PeopleSoft including minimizing and/or retiring customizations to delivered PeopleSoft pages OR implementations or upgrades to PeopleSoft Financials version 9.2 in a public sector environment. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Additional Desired Experience:** | |
| **Qualification 5 (Desired):** At least five years of experience writing complex SQLs and PeopleSoft Queries to extract system data or diagnose problems. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 6 (Desired):** At least five years of hands-on experience with Supplier Contract Management, Sourcing, Accounts Receivables, Billing, Enterprise System Automation (ESA) modules including Customer Contracts and Project Costing, and financial reporting activities. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 7 (Desired):** At least three years of experience directing a primary functional lead conducting fit/gap analysis, design, configuration and testing of one or more PeopleSoft implementations or re-architectures. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 8 (Desired):** Experience with Oracle’s Image release process and applying upgrades to an existing production application. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 9 (Desired):** Experience leading / managing teams. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| CERTIFICATION: I hereby certify that: (i) all statements made on this form are true and complete, to the best of my knowledge, including the verification of any experience; (ii) the specific consultant proposed on this form will be available for the duration of the contract.  Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title:  Typed or Printed Name:       Date: Click here to enter a date. | |

Note: Type to expand response areas on the form. Proposers may copy and paste the data entry rows in order to document additional projects to fully demonstrate the qualifications.

APPENDIX E.2: PROPOSED SOLUTION SPECIALIST

**Using the chart below, describe in detail how the consultant meets the Minimum Requirements** (on what projects/systems/software/etc.) and **where, when and how long the consultant worked on the particular project** using the specified software/technology. Please provide **clear and accurate descriptions of the consultant’s experience for each Minimum Requirement.** Beyond the minimum qualifications, the State has identified additional desired qualifications that will be considered as part of the technical scoring of proposed staff. All experience related to these additional desired qualifications should be detailed on this form.

**NOTE:** Resumés should not be submitted. All supporting information must be included on this attachment.

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| **Solution Specialist** | |
| **Name of Proposed Consultant:** | |
| **Minimum Qualifications:** | |
| **Qualification 1 (Minimum):** At least five years of experience serving as a functional area lead on (i) re-architecture efforts using PeopleSoft Financials version 9.2 to align with the best practice use of PeopleSoft OR (ii) implementations or upgrades to PeopleSoft Financials version 9.2. This experience should include the following activities:   1. Experience analyzing current business processes and building process model diagrams. 2. Experience performing a fit/gap analysis on existing customizations to move to delivered functionality. 3. Experience developing functional testing plans, scripts, or scenarios. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Additional Desired Experience:** | |
| **Qualification 2 (Desired):** Experience writing complex SQLs and PeopleSoft queries to extract system data or diagnose problems. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 3 (Desired):** Experience with public sector clients. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 4 (Desired):** Experience with Oracle’s Image release process and applying upgrades to an existing production application. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 5 (Desired):** Experience presenting a variety of business and technical information to all levels of an organization. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 6 (Desired):** Experience working with third party products that integrate with PeopleSoft. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 7 (Desired):** Experience leading / managing teams. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| CERTIFICATION: I hereby certify that: (i) all statements made on this form are true and complete, to the best of my knowledge, including the verification of any experience; (ii) the specific consultant proposed on this form will be available for the duration of the Statement of Work.  Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title:  Typed or Printed Name:       Date: Click here to enter a date. | |

Note: Type to expand response areas on the form. Proposers may copy and paste the data entry rows in order to document additional projects to fully demonstrate the qualifications.

APPENDIX E.3: PROPOSED SENIOR FUNCTIONAL ANALYST

**Using the chart below, describe in detail how the consultant meets the Desired Qualifications** (on what projects/systems/software/etc.) and **where, when and how long the consultant worked on the particular project** using the specified software/technology. Please provide **clear and accurate descriptions of the consultant’s experience for each Desired Qualification.**

**NOTE:** Resumés should not be submitted. All supporting information must be included on this attachment.

|  |  |
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| **Senior Functional Analyst** | |
| **Name of Proposed Consultant:** | |
| **Desired Qualifications:** | |
| **Qualification 1 (Desired):** At least four years of experience with (i) re-architecture efforts using PeopleSoft Financials version 9.2 to align with the best practice use of PeopleSoft OR (ii) implementations or upgrades to PeopleSoft Financials version 9.2. This experience should include the following activities:   1. Business analysis and testing experience with PeopleSoft Financials to meet business and functional needs and requirements. 2. Experience writing complex SQLs and PeopleSoft Queries to extract system data or diagnose problems. 3. Experience creating design documents and test scripts. 4. Experience in troubleshooting problems. 5. Experience with PeopleSoft using at least three of the following toolsets: XML, SQR, PeopleTools, PeopleCode, Datamover, Application Engine, Components Interface, and Application Designer. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 2 (Desired):** Experience with public sector clients. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 3 (Desired):** Experience with Oracle’s Image release process and applying upgrades to an existing production application. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 4 (Desired):** Experience presenting a variety of business and technical information to all levels of an organization. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 5 (Desired):** Experience working with third party products that integrate with PeopleSoft. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| CERTIFICATION: I hereby certify that: (i) all statements made on this form are true and complete, to the best of my knowledge, including the verification of any experience; (ii) the specific consultant proposed on this form will be available for the duration of the Statement of Work.  Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title:  Typed or Printed Name:       Date: Click here to enter a date. | |

Note: Type to expand response areas on the form. Proposers may copy and paste the data entry rows in order to document additional projects to fully demonstrate the qualifications.

APPENDIX E.4: PROPOSED SENIOR TECHNICAL ANALYST

**Using the chart below, describe in detail how the consultant meets the Desired Qualifications** (on what projects/systems/software/etc.) and **where, when and how long the consultant worked on the particular project** using the specified software/technology. Please provide **clear and accurate descriptions of the consultant’s experience for each Desired Qualification.**

**NOTE:** Resumés should not be submitted. All supporting information must be included on this attachment.

|  |  |
| --- | --- |
| **Senior Technical Analyst** | |
| **Name of Proposed Consultant:** | |
| **Desired Qualifications:** | |
| **Qualification 1 (Desired):** At least four years of experience with (i) re-architecture efforts using PeopleSoft Financials version 9.2 to align with the best practice use of PeopleSoft OR (ii) implementations or upgrades to PeopleSoft Financials version 9.2. This experience should include the following activities:   1. At least one prior engagement where the candidate was responsible for performing technical analysis, coding, developing interfaces, or testing for an implementation, upgrade, or re-architecture of PeopleSoft. 2. Experience in using PeopleTools 8.55 or higher. 3. Experience tuning code for performance issues. 4. Experience writing complex SQLs and PeopleSoft Queries to extract system data or diagnose problems. 5. Experience creating technical design documents and unit test scripts. 6. Experience with PeopleSoft using at least three of the following toolsets: XML; SQR; PeopleTools; PeopleCode; Datamover; Application Engine; Component Interface; or Application Designer. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 2 (Desired):** Experience with public sector clients. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 3 (Desired):** Experience with Oracle’s Image release process and applying upgrades to an existing production application. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 4 (Desired):** Experience presenting a variety of business and technical information to all levels of an organization. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 5 (Desired):** Experience working with third party products that integrate with PeopleSoft. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| **Qualification 6 (Desired):** Experience with PeopleSoft PICASO. | |
| **Dates (month/year) of Experience:** |  |
| **Company Name(s):** |  |
| **Contact Name(s) and Title(s):** |  |
| **Contact Phone Number(s):** |  |
| **Project(s) Name and Description:**  **Description of Consultant’s roles and responsibilities on the project(s) related to this requirement:** |  |
| CERTIFICATION: I hereby certify that: (i) all statements made on this form are true and complete, to the best of my knowledge, including the verification of any experience; (ii) the specific consultant proposed on this form will be available for the duration of the Statement of Work.  Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title:  Typed or Printed Name:       Date: Click here to enter a date. | |

Note: Type to expand response areas on the form. Proposers may copy and paste the data entry rows in order to document additional projects to fully demonstrate the qualifications.