

Memorandum

To: Secretariat

Date: March 14, 2011

From: **California Energy Commission – Pat Perez**, Deputy Director
1516 Ninth Street
Sacramento CA 95814-5512
Fuels and Transportation Division

Subject: **Information Technology Purchase Order**

- A. Contractor/Vendor Name:** Stanfield Systems Incorporated
- B. Project Manager and/or Contact(s):** Malachi Weng-Gutierrez
- C. Term of Agreement:** April 12, 2011 to June 30, 2013
- D. Cost of Agreement and Funding Source:**
\$299,148 from ERPA resources, State Budget List Number 600.00FL.
Split year funded: FY 10/11 \$57,880, FY 11/12 \$168,367, FY 12/13 \$71,901.
- E. Purpose/Objective of Agreement:**
The purpose of this contract is to procure model software support, maintenance, and enhancement services for the new and updated Fuels and Transportation Division modeling tool. The new tool will be used to forecast transportation fuel demand and evaluate policy scenarios and support the 2011 *Integrated Energy Policy Report*.
- F. Summary of Work to be Performed (Attach as Exhibit A - Scope of Work):**
The software support and maintenance contractor will provide maintenance and support services during the first two years of operation. These services will provide on-call support, informal training, answering model questions, and remedial repairs to DynaSim software code, minor model enhancement services, standard report modifications, and other maintenance support as defined in the scope of work.

Exhibit A – Scope of Work

DynaSim Software Support and Maintenance Contract Statement of Work (SOW)

Objectives

The Energy Commission expects a single contractor will be able to provide software support and maintenance for all elements of the DynaSim Model. As described above, the model has been developed using the Mathworks Matlab tool for the data intensive processing and Microsoft ASP.NET, C# for the user interface and reporting aspects of the application. All data is stored in a Microsoft SQL database. Reports are generated using Microsoft SQL Reporting Services and Dundas Maps.

Software Support and Maintenance Contractor Tasks and Responsibilities

The SSM's responsibilities include, but are not limited to the following tasks

General Maintenance and Help Desk Support

1. Participate in meetings regarding software defect remediation as necessary. The contractor would be responsible for providing the remediation approach for outstanding issues.
2. Track software defects and enhancements in an on-line system that is accessible by Energy Commission authorized staff.
3. The contractor will be expected to provide help desk services to the Energy Commission during normal working hours (M-F, 8-5). Typically, end users will call Energy Commission staff, known as DynaSim Administrators, for assistance with running the model. If a DynaSim Administrator determines that there is a technical issue with the model, or they require guidance or additional training regarding a specific aspect of the model, they will initiate a call to the SSM contractor. Responsibilities for this task will include:
 - a. Tracking and documenting the nature of the call,
 - b. Establishing a remedial action plan,
 - c. Assigning a contractor technical resource to correct the problem.
 - d. Reporting back to the person who initiated the call with appropriate status.
 - e. Preparing a call report, (quantity, nature of the call, resolution status) on a monthly basis.
4. Repair software defects, found in the Microsoft C#, Microsoft SQL, and Matlab code. Repairs should occur as specified in the Service Level Agreement included in Attachment D.
5. Support installation of software patches onto Energy Commission servers.
6. Attend monthly status meetings. A tentative status meeting agenda would consist of:
 - a. Call report review
 - b. Discussion of open issues
 - c. Status of any approved enhancement or modifications
 - d. Budget remaining in contract

Enhancement and Modifications to DynaSim

1. Attend software requirements meetings as needed to understand and develop minor enhancements to DynaSim. Develop a software requirements specification based upon the agreed upon requirements.
2. Update the DynaSim Software Design Document.
3. Provide guidance regarding the hardware infrastructure required to support DynaSim. Hardware is located at the Energy Commission office in Sacramento but will likely be moved to the Resource Agency Data Center as part of California's IT consolidation.
4. Enhancements to the model -- Potential new development in the Matlab, SQL Database, and Microsoft .NET, environments. These enhancements could be in the areas of usability, new interfaces, report creation using Microsoft Reporting Services, and/or changes to the underlying econometric model and equations. Changes to the model could be caused by policy changes resulting in new required analyses, adaptation of new or different economic theories, access to different data, or discovery of modeling anomalies. Expectations regarding contractor responsiveness to enhancement requests are:
 - a. All requests will be processed through the DynaSim Change Control Board (CCB),
 - b. Upon request for pricing by Energy Commission, response times will follow these guidelines:
 - i. Urgent – high level cost estimate for the change within 2 working days. Formal quote and Statement of Work once the Energy Commission has determined to move forward – 3 working days after notice from the Energy Commission request.
 - ii. Non-Urgent – high level cost estimate for the change within 10 working days. Formal quote and Statement of Work once the Energy Commission has determined to move forward – 10 working days after notice from the Energy Commission request.
 - c. All quotes should include costs for the enhancement, a schedule estimate, and Statement of Work.
5. Provide support during user acceptance testing of any enhancement or modification.
6. Provide support for the installation of enhancements or modifications on Energy Commission servers, test and production. This includes providing an updated version of the source code.