

CMAS Customer Reference Instructions

Attachment A – Instructions for Completing Form

Purpose of This Document

NOTE: If you are applying for an agreement that includes training courses, please email cmas@dgs.ca.gov to get specific instructions on completing this form.

This guide explains how CMAS applicants must complete the required Customer Reference Form. All applicants must follow these instructions to ensure references are accepted and properly evaluated by the State.

Failure to follow the instructions provided may result in processing delays or rejection of the application.

1. Definitions of Services

Consulting Services: Services of an advisory nature that provide a recommended course of action or personal expertise (product of the mind).

Personal Services: Services provided directly by individuals, such as film production, interpretation/translation, record shredding, and training.

2. Customer Reference Requirements

- Provide a minimum of three (3) customer references supporting the job titles/labor categories offered from the base schedule. A single reference may include multiple labor categories. **Certified California Small Businesses (SBs)** are required to provide only one (1) reference.
 - References must be for projects completed within the last three (3) years or is currently ongoing.
 - References may be from either the public or private sector.
 - Applicants must submit the required customer reference form with the CMAS application.
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3. Company (CMAS Applicant)

Enter the name of the company that provided the services. Newly formed companies without sufficient references may enter the name of the owner or partner who performed the work.

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4. Project Title

Enter the title of the project for which services were provided.

5. Project Begin and End Dates

Enter the start date for services performed within the last three (3) years. Enter the end date for completed work. If the project is ongoing, enter 'On-going' and describe the tasks completed to date.

6. Reference Customer Information

Enter the customer's agency or company name, address, contact person, phone number, and email address. If you were a subcontractor, list the prime contractor as the customer.

7. Project Description

Briefly describe the nature of the project, including the scope and services provided.

Suggested Length: Three - five (3 - 5) sentences summarizing the objectives, environment, and outcomes (See example).

8. Job Titles / Labor Categories

List the job titles from the base schedule that apply to this reference.

Requirements (Must Do):

- Requested titles must fall under **approved SIN categories**.
- Titles must **exactly match** the Base Schedule (e.g., "Project Manager IV" is not acceptable if written as "Project Manager 4").

Restrictions (Must Not Do):

- Do NOT add additional information to job titles (e.g., internal company versions).
 - Do NOT add job titles not found in the base schedule.
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9. Specific Services Provided

In the area that begins “The specific services my company provided to this referenced customer within the last three (3) years are:”

Describe the services performed in chronological order and provide **two - three (2-3) sentences for each job title** describing the work performed. This should also include how the work directly shows fulfillment of the job requirements outlined in the base schedule.

Example Job Description:

Project Manager II – Responsible for managing communication with client stakeholders, reporting progress, guiding the team during development and implementation, and ensuring timely delivery of deliverables.

If more space is needed, attach an additional sheet.

10. Base Schedule Requirements

Labor categories must include well-defined functional requirements, minimum experience requirements, minimum education requirements, and labor rates.

11. Reference Validation

The State will validate references by phone or email and may reject any reference it believes to be falsified or associated with an entity the applicant partially or wholly owns.

Applicants must ensure their references respond promptly to validation requests.

12. Helpful Resources

- [CMAS Before You Apply Guide](#)
 - [CMAS Management Guide](#)
 - Unauthorized SIN Categories (See page 50 CMAS Before You Apply Guide)
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Company (CMAS Applicant)	CMAS Company
Project Title	Business Intelligence Enterprise Solution Development
Project Begin Date	December 1, 2022
Project End Date	November 30, 2023
Reference Customer Agency/Company Street Address City, State and Zip Code Contact Person Contact Phone Number and Extension Contact Email Address	City of Sacramento 123 Street, Suite #50A Sacramento, CA 95823 John Doe (916) 123-4567 John.Doe@email.com
Project Description: This description should briefly describe what the project entailed, i.e. the scope of the project.	The project objective is to Design, Develop, Implement & Support a Business Intelligence Enterprise Solution for City's Police and Fire Departments.
Requested Job Titles/ Labor Categories: List the job titles offered from the base schedule you identified in Section 3 that this reference supports.	Project Manger II Business Process Engineer IV Database Administrator IV Database Analyst/Programmer III Database Analyst/Programmer IV Emerging Technology Specialist III Engineer/Architect V Quality Assurance Configuration Analyst III Software/Web Developer V Technical Writer/Editor Trainer II

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If more space is needed, use additional sheets.

The specific services my company provided to this referenced customer within the last 2 years are:

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City's Police and Fire department was looking for an end to end cloud based Enterprise BI solution to help achieve following objectives:

- Consolidation and analysis of data from multiple systems to provide historical, current, and predictive views of business operations.
- Increased efficiency and accuracy in response time data reporting.
- Enhanced real-time data reporting for patrol officers, firefighters, and command staff, allowing for improved service analysis capabilities.
- Real-time or near real-time dashboards for reporting current number of patrol/response units available, number of patrol/response units out of service, number of pending calls for service, number of working calls, average response times, etc. to enable supervisory personnel to actively monitor resources.

Understanding the client's requirement, CMAS Company suggested enterprise wide BI Solution Implementation utilizing Microsoft Azure cloud platform. The BI solution consolidates the data from City's Police and Fire CAD and RMS Systems into Azure SQL Data warehouse and provides analytics and reporting using Power BI.

CMAS Company proposed the complete solution in 3 phases using Microsoft Applications stack (Azure SQL Data warehouse, Azure Data Factory, SSIS, Power BI):

- Phase 1 - Data warehouse procurement and deployment
- Phase 2-m engine procurement, configuration, and deployment
- Phase 3 - ERP and ETL data Interface configuration and deployment

As part of this multi-year engagement, CMAS Company will also be providing 8x5 support for a period of 5 years post implementation.

The City's Enterprise BI Solution/Software Development project involved our end-to-end Project Management to Design, Develop and Implement the solution for the City's Police & Fire Departments. The Quality Assurance team will ensure that quality solution is delivered to the City. SQL Data warehouse was designed per the requirement and integrated with City's existing CAD and RMS Systems. It is performed whereby the same acted as the data input source to perform analytics and generate the desired reports for consumption.

Correlated Labor Category - Tasks Performed During The Engagement

Project Manager II: Responsible for managing communication with client stakeholders and reporting the project progress and updates. Guided and assisted the team during the development and implementation. Led the effort for overall management of the project and ensured the timely delivery of the agreed deliverables.

Business Process Engineer IV: The Business Process Engineer being the domain expert carried strong knowledge about business processes, reengineering methodologies, and data modeling techniques. He leveraged the same to define the complete business goal for the BI solution and assisted in re-engineering the client's processes to achieve the goals tied to the desired solution. In addition, also assisted during other project activities like knowledge transfer & resource training, team coordination, team's supervision, and consulting.

Database Administrator IV: The Database Administrator leveraged his strong knowledge about database analysis, design, and administration to assist the team in desired BI Solution design and development. He was also responsible for capacity planning, database design, performance monitoring, troubleshooting while also taking care of backup and data recovery. Advised and assisted client users with their database related question or problems.

Database Analyst/Programmer III & IV: Studied the database system requirement, collected all data elements, and prepared database specifications. Analyzed project requirements and identified database characteristics, such as location, security, validation checks, amount of space, and access method. Assisted the team members during database design during complex database related tasks. Established procedures for operations of the database and database management systems.

Emerging Technology Specialist III: The proposed BI solution leveraged emerging BI technologies such as Microsoft Azure SQL Data warehouse, Azure Data Factory and Power BI. To facilitate the same, our Emerging Technology Specialist worked closely with solution architect to investigate, analyze, and map the solution to the technical requirement. Significantly contributed to the effort to plan, conduct, and technically direct the overall solution creation and development. He also worked in collaboration with the development team to guide and assist them with overall solution development & implementation.

Engineer/Architect V: Responsible for overall solution architecture development based on the requirements specifications per the desired solution objectives. The design architecture included the various ETL interfacing components and their communication with each other to support the complete solution. Evaluated compatibility of BI Solution development efforts with City's architectures and recommends appropriate adjustments. Guided and supported the team members to achieve the project goals.

Quality Assurance Configuration Analyst III: Responsible for maintaining the quality assurance program against the project deliverables. Helped in defining and establishing the various QA standards and techniques which were required to be adhered across the project lifecycle i.e., during requirement capture, design & actual development, testing, and documentation. Also served as liaison between various functional groups to resolve any issues regarding quality assurance/configuration management.

Software/Web Developer V: Responsible for actual development of the solution for the customer. Analyzed customer requirements and helped in designing the overall solution. Conducted unit testing, analyzed the test results, and modified the code accordingly. Customized code components as per the requirement.

Technical Writer/Editor: Drafted technical documentation leveraging his experience in writing and designing documentations for latest technologies and applications in an engaging and easy-to-understand manner for users. Led the effort of writing user guides, operating guides, and training guides while working in collaboration with Architect, Emerging Technology Specialist and Trainer. Interacted with client's users, analysts, and programmers on day-to-day basis to execute his responsibilities.

Trainer II: CMAS Company deployed senior functional consultant as trainer for this project. In addition to training delivery, responsible for identifying the training requirements, creating the complete curriculum, and defining the training timelines. Also worked closely with client and project team members to understand the training requirements and ensured that the training objectives are met by providing a complete comprehensive training program. Guided and assisted the technical writer for updating the documentation to ensure timeliness, relevance, and contractual compliance.

☒ Reference Validation

The State will validate references via email or phone. The State reserves the right to reject any reference it reasonably believes to have been falsified or if the referencing customer is an entity the applicant partially or wholly owns.

Applicants are responsible for staying in contact with their references to ensure prompt attention to the State's validation.

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Company (CMAS Applicant)	
Project Title	
Project Begin Date	
Project End Date	
Reference Customer Agency/Company Street Address City, State and Zip Code Contact Person Contact Phone Number and Extension Contact Email Address	
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Requested Job Titles/ Labor Categories: List the job titles offered from the base schedule you identified in Section 3 that this reference supports.	

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Attachment A – Customer Reference Form, Continued

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