

RFP Number: IT-2021-80RB

Project Title: Master Agreements for Technical Staff Augmentation Services

**Evaluation Criteria & Proposal Submission Forms
Attachment 12**

Attachment 12-A - Methodologies

Attachment 12-B – Placement History

Attachment 12-C – Key Staff

**Attachment 12-D – Proposer’s Acceptance Of, or Exceptions To, Master Agreement Terms
and Conditions**

Attachment 12-E – Viability of Firm

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Reference #	Evaluation Criterion: Methodologies
12-A	Maximum Points for this Criterion: <u>6 Points</u> (out of 100 possible points)
Proposal Requirements: Proposers must describe and discuss their methodologies for sourcing positions, meeting the JCC’s invoicing requirements, and ensuring timely submittal of requests for travel expense reimbursement.	
Proposer must complete the following:	
Part I – Sourcing: Describe and discuss your methodology of sourcing the positions set forth in Attachment 12-B, Placement History. Your description and discussion should include, but not be limited to: (1) your existing subcontracting relationships with other firms and what classifications they cover; (2) how you source hard-to-fill positions where you don’t currently have a subcontracted firm in place and what kind of timeline/constraints/policy considerations do you have in place before you seek new subcontracted firms in order to identify and propose candidates for a specific staffing request; and (3) your plans for filling positions in diverse geographic locations through California.	

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Part II – Invoicing Compliance: The JCC will require both invoicing the Work Order detail level as well as providing a monthly summary statement at the Master Agreement level that is substantially in the form and substance set forth in Attachment 2, Invoicing Sample. Describe and discuss your methodology of providing invoicing and summaries that meets the requirements of this RFP. Further, please describe and discuss your methodology for keeping track of Key Personnel’s time under a Work Order to substantiate specific hours worked and amounts invoiced. *NOTE: Key Personnel are not JCC employees, the JCC will not accept timesheets signed by a Work Order Project Manager as substantiation for time worked on a Work Order.*

Part III – Timely submission of travel reimbursements: Awarded master agreements will require invoicing of authorized travel expenses no later than two (2) months after the end of the month in which the travel expense was incurred, including submission of receipts for all expenses to be reimbursed (for reimbursement of mileage a Mapquest® printout or equivalent will be required for mileage substantiation). Describe and discuss your methodology for keeping track of Key Personnel’s travel, accounting for the resulting travel expenses, and ensuring timely submission of all authorized travel expense reimbursement requests and provide samples of any forms you presently use to keep track of this information. Describe how, at a minimum, you can provide the level of detail outlined in Attachment 2, Master Agreement Terms and Conditions, Exhibit G, Attachment 5.D, Sample Expense Statement, including summarization of the travel expense balance remaining from the Work Order.

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Reference #	Evaluation Criterion:	Placement History
12-B	Maximum Points for this Criterion:	<u>15 Points</u> (out of 100 possible points)

Proposal Requirements: In order to demonstrate the breadth and depth of proposer’s ability to fill the JCC’s staff augmentation requirements, proposers must indicate the number of placements (actual positions filled) they have made in the past 12-months for each of the JCC job classifications set forth in Classifications Attachment of the RFP. Proposers must include references for each placement made in the past 12-months.

Proposer must complete the following:

Part I – Number of placements per JCC job classifications in last 12-months. Indicate the number of placements your company has made in the past 12-months, including your use of subcontracted firms to make a placement. In the event your placement classifications differ from the JCC list, account for your placements in the most equivalent JCC classification.

Classification	Number of Placements in Past 12-Months
Applications IT Architect	
Application Support Analyst	
Application Tester	
Application Testing Lead	
Business Applications Analyst	
Sr. Business Applications Analyst	
Business Systems Analyst	
Sr. Business Systems Analyst	
Data Modeler	
Data Scientist	
Database Administrator	
Enterprise IT Architect	
Infrastructure/Operations IT Architect	
IT Developer	
IT Developer Lead	
IT Governance Subject Matter Expert	
IT Infrastructure Subject Matter Expert	
IT Program Manager	
IT Project Manager	
Network Engineer	

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Classification	Number of Placements in Past 12-Months
Quality Assurance Analyst	
Release Analyst	
Release Manager	
Report Writer	
Security Analyst	
Service Delivery Manager	
Technical Analyst	
Sr. Technical Analyst	
Technical Construction Analyst	
Technical Writer	
TIBCO Development Engineer	

Part II – References: Using the template set forth in this Part II, below, provide a reference for **each** placement you have noted in Part I, above. You should replicate the reference template as many times as may be required. References for each placement listed in Part I, above, are mandatory; therefore, you must include a corresponding reference form for each placement you have listed in Part I. In the event your placement classifications differ from the JCC list, provide a reference for your placement in the most equivalent JCC classification. In the reference form, below, the term “Company” means the name of the firm/entity where the individual you placed performs the work they were placed for. The JCC may contact some or all of the references provided in order to determine the proposer’s performance record on placement work similar to that described in this RFP. The JCC reserves the right to use the information gained from the reference Company in the evaluation process. *NOTE: Reference information denoted with an * in the highlighted boxes on the form below are deemed by the JCC to be proposer’s proprietary and confidential information which meets the disclosure exemption requirements of Rule 10.500, and will NOT be disclosed pursuant to a request for public documents.*

JCC Classification	
Duration of Assignment (List Dates)	
Name of Individual Placed*	
Company Where Placed*	
Company Point of Contact (Name)*	
Email Address and Phone Number for Company Point of Contact*	

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Reference #	Evaluation Criterion: Key Staff
12-C	<p>Maximum Points for this Criterion: <u>6 Points</u> (out of 100 possible points)</p>
<p>Proposal Requirements: Proposers must designate certain highly experienced and qualified individuals as Key Staff to function in specified roles and serve as single points of contact for proposer in their respective subject matter areas under a resulting master agreement.</p>	
<p>Proposer must complete the following:</p>	
<p>Part I – Designate Key Staff: Identify and designate individual(s) that will serve as Key Staff for proposer in a subsequent master agreement (if a master agreement is awarded to proposer). The following positions have been designated as Key Staff: (1) Sourcing Manager, (2) Account Representative, and (3) Accounting Lead. Key Staff will be the single points of contact with the JCC regarding their respective subject matter areas.</p>	
<p>Part II – Resumes: Provide detailed and complete resumes documenting the background and professional expertise of each individual that proposer proposes to be a designated Key Staff member for proposer in a subsequent master agreement (if awarded to proposer). Key Staff resumes will be incorporated into the master agreement, if awarded.</p>	
<p>Part III – Stability of Key Staff: Identify how long each of the designated Key Staff members have been serving in those specified roles, and if less than two-years for any designated Key Staff, describe the reasons for such short tenure, and identify how long their predecessor(s) served in those roles, and why the predecessor left that role. Describe and discuss the company’s specific plans for ensuring stability of Key Staff for the duration of a prospective master agreement.</p>	

End of Evaluation Criterion 12-C

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Reference #	Evaluation Criterion: Proposer’s acceptance of, or exception(s) to, the master agreement terms and conditions
12-D	Maximum Points for this Criterion: <u>15 Points</u> (out of 100 possible points)
<p>Proposal Requirements: Proposers must either indicate acceptance of the Master Agreement Terms and Conditions, as set forth in Attachment 3, or clearly identify exceptions to the Master Agreement Terms and Conditions.</p>	
<p>If exceptions are identified, proposers must also submit:</p> <ul style="list-style-type: none"> • a red-lined version of Attachment 3 that clearly tracks proposed changes (additions, deletions, or any revised language) to the attachment, and • a written summary to substantiate each individual proposed change, including <ul style="list-style-type: none"> (i) the relevance of the change, (ii) the vendor’s rationale for proposing the change, and (iii) the proposed benefit to the JCC for accepting such individual change. 	
<p>Proposer must complete the following:</p>	
<p>Mark the Appropriate Choice, below [<i>you must mark one or the other</i>]:</p> <p><input type="checkbox"/> Proposer accepts <i>Attachment 3– Proposer’s Acceptance of Terms and Conditions</i> with no exceptions.</p> <p>OR</p> <p><input type="checkbox"/> Vendor proposes the following exceptions/modifications to <i>Attachment 3– Proposer’s Acceptance of Terms and Conditions</i>:</p>	
<p>If proposing exceptions, submit red-lined text of <i>Master Agreement Terms and Conditions</i> here [Red-lined text of <i>Master Agreement Terms and Conditions</i> must clearly track all proposed changes to the terms and conditions, including any additions, deletions, or revised language. DO NOT INSERT INBEDDED DOCUMENTS.]:</p>	
<p>If proposing exceptions, submit written summary of each proposed change here [For each individual proposed change, the written summary must identify the specific reference/section/sub-section number, and include (i) relevance of the change, (ii) rationale for proposing the change and (iii) proposed benefit to the JCC for accepting such individual change.]:</p>	

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Reference #	Evaluation Criterion: Viability of Firm
12-E	Maximum Points for this Criterion: <u>5 Points</u> (out of 100 possible points)
Proposal Requirements: Proposers must demonstrate that they are a stable, long-term viable business entity that provide staff augmentation sourcing services as an integral part of their core business, and that they are directed by long-term experienced executives and Key Staff with expertise and understanding of the technical staff augmentation sourcing marketplace.	
Proposer must complete the following:	
Part I – Company Information: Provide the legal business name of the company, including the type of business entity, and if the company is a corporation identify the state in which the company was incorporated. Describe and discuss the number of years your company has been in business indicating how long you have been providing sourcing services, including whether sourcing is the company’s sole core business, and if not, describe the other core businesses and how sourcing fits into the company’s organizational model. Identify all mergers, acquisitions, and initial public offerings that have occurred with your firm since January 2018. Provide a statement of any bankruptcies filed by the proposer and any law suits filed against the proposer for malfeasance and a detailed listing of the adverse action, cause, number, jurisdiction in which filed and current status (provide a description of the outcome of any such legal action where there was a finding against the respondent or a settlement). Identify the company’s key executives and provide a brief description of their backgrounds.	

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Part II – Turnover Rate of Executives and Key Staff: Describe and discuss the turnover rate of key executives and the designated Key Staff members. Describe and discuss the company’s key executive/Key Staff retention philosophy.

End of Evaluation Criterion 12-E