**Attachment 9**

**Evaluation Criteria & Proposal Submission Forms**

**Attachment 9-A -- Methodologies**

**Attachment 9-B – Staffing Industries & Classification Titles**

**Attachment 9-C – Key Staff**

**Attachment 9-D – Proposer’s Acceptance Of Judicial Council Master Agreement Terms and Conditions**

**Attachment 9-E – Viability of Firm**

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| **Reference #** | **Evaluation Criterion:** | **Methodologies** |
| **9-A** | **Maximum Points for this Criterion:** | \_\_\_15 Points\_\_\_\_ (out of 100 possible points) |
| **Proposal Requirements:** Proposers must describe and discuss their methodologies for sourcing candidates to fill Classification Titles, meeting the Judicial Council’s invoicing requirements, and ensuring timely submittal of requests for reporting. Suppliers that enter into a Master Agreement with us may solicit subcontractor suppliers to aid them in filling work orders. Subcontractors must comply with all stipulations in the RFP and Master Agreement. | | |
| **Proposer must complete the following:** | | |
| **Part I – Sourcing:** Describe and discuss your methodology of sourcing candidates to fill the Classification Titles set forth in Attachment 2, Appendix E, Classifications. Your description and discussion should include, but not be limited to:   1. Describe your ability to expeditiously supply the Judicial Council and Participating JBE’s with high-quality, cost-effective professional and administrative temporary workers in San Francisco, Sacramento, and the various JBE locations throughout California. Detail how and where your agency would typically source and advertise based on the list of job classifications provided. 2. The Judicial Council is headquartered in San Francisco and also has offices located in Sacramento. Additionally, there are courthouses, some remotely located, throughout the state of California where the Judicial Council, or other JBE’s, will have occasional needs for temporary staff. Describe: 1) your firm’s ability, if any, to allow other JBE’s such as the Courts of Appeal, an option to buy in to the Master Agreement; 2) your firm’s ability to provide staffing services to all Judicial Council and Participating JBE locations without incurring additional costs than what is proposed in your firm’s completed Attachment 10, Pricing Submission Form, and 3) how our account would be managed under the single point of contact requirement. 3. Describe what sets your firm apart from other staffing firms, and why and how you are qualified to support the Judicial Council and Participating JBE’s as a client. 4. Describe your current turnover rate for your agency’s recruiters and account representatives. 5. Provide a detailed description of your firm’s testing, screening, and interview processes. Using the descriptions provided for the Judicial Council’s job classifications as set forth in Attachment 2, Appendix E, Classifications, describe the criteria of how your firm determines if a candidate meets the minimum qualifications of the position. 6. Describe your firm’s ability and success rate at placing long-term temporary assignments. Describe any metrics your firm has in place to track time to fill, and quality of hire. Discuss the average response time on completing requests and successfully placing temporary staff. Also provide hours of business, and work hours of key staff. 7. Describe your firm’s process or policy regarding replacing a temporary employee (e.g., temporary employee exhibits excessive absenteeism, tardiness, personality conflicts, or other employee relations issues). 8. Temporary staff may be required to travel between Judicial Council or Participating JBE offices for business or training purposes. Describe your existing policies, procedures, insurance, and billing charges for travel and travel reimbursements, etc. to allow for these requirements, if applicable. 9. Describe your process or ability to conduct legally compliant background checks for selected candidates prior to the start date of a temporary assignment. 10. Describe your process for completing reference checks and employment verifications for selected candidates. Include whether these are completed before candidates are placed or after. 11. 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? 12. Describe how your agency would brand or represent our particular entity. Provide a sample advertisement for one of the classification titles listed in Attachment 2, Appendix E, Classifications. 13. Selected bidders will be required to provide all sexual harassment prevention training, safety practices/training, and any education or training as required by California State Law. List the training classes your firm offers to temporary workers and how often they are required to take the classes (if applicable). 14. Selected bidders must strictly adhere to all state and federal laws with respect to discrimination in employment and shall not discriminate against any individual on the basis of race, color, religion, gender, sexual orientation, marital status, national origin, age, or disability. The selected bidders must conform to the provisions of the Immigration Reform and Control Act of 1986 by verifying the employment eligibility of each person referred to the Judicial Council and/or any JBE. When applicable, the selected bidders must also conform to the provisions of the Patient Protection and Affordable Care Act (ACA). Describe your policies and practices of conforming to these requirements. 15. Ergonomic needs, evaluations and/or equipment required by Assigned Temporary Personnel will be the responsibility of the selected bidders or their respective subcontractor(s) to provide and pay for. Describe your policies and practices regarding ergonomics and determining ergonomic needs for temporary staff placed with your clients. 16. The Judicial Council may require temporary staff to work in the office, from home, or some combination of both (hybrid). Remote work must be conducted from a location or residence within California, and within a reasonable distance to the office location for the purposes of picking up/dropping off equipment, attending meetings, training, etc. Describe any policies and procedures your firm will utilize to ensure those placed on assignment will adhere to this requirement. 17. Provide written verification certifying that all temporary staff provided by your firm will be considered employees of your firm, or of your firm’s subcontractor(s), as applicable, and that your firm or your subcontractor(s) will be responsible for maintaining, at all times, suitable minimum insurance coverage and all payroll taxes covering each person whose services you provide to the Judicial Council or Participating JBE’s. 18. Indicate what technology your firm has in place and/or have available for implementation to reduce paperwork and expedite response times. Include all software and hardware requirements expected of the client. | | |
| **Part II – Invoicing Requirements:** The Judicial Council will require invoicing on a regular, per pay period schedule that references both a purchase order and the Master Agreement contract number. From each supplier, the invoice should be consolidated with all applicable charges for the referenced time period for staffing, background checks, and any other services referenced. If subcontractors are utilized for staffing or background checks, the Proposer should include supporting information or documentation that includes the name of the subcontractor and the amount charged, and the name of the temporary staff member. Invoices will be accepted in pdf format (preferred) or hard copy.   1. 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 Assigned Temporary Personnel’s time under a Work Order to substantiate specific hours worked and amounts invoiced. (Please note, that as Assigned Temporary Personnel are not Judicial Council or Participating JBE employees, the Judicial Council or Participating JBE will only accept and pay invoiced hours that are substantiated by timesheets approved online or signed by an Assigned Temporary Personnel’s Judicial Council or Participating JBE Supervisor, Manager, or their Judicial Council or Participating JBE assigned proxy, as substantiation for time worked on a Work Order.) 2. Describe how often your firm will reconcile accounts payable/receivable and billing errors made to or by the Judicial Council or Participating JBE, if any. Include the procedure by which the Judicial Council or Participating JBE will be notified, including timing of notifications, penalties imposed and reimbursement processes. 3. The Judicial Council and Participating JBE’s are state entities unable to pay standard conversion, buyout, or referral fees for non-executive positions. Further, per Judicial Council personnel policy, there is a six (6) month maximum for any temporary worker assignment. This means Assigned Temporary Personnel may not have an assignment lasting more than a six (6) month timeframe. Provide a conversion period duration from the assignment of a temporary staff member, after which the Judicial Council or Participating JBE would be able to hire the assigned temporary staff member. The conversion hours you provide will be added to the Master Agreement, along with pricing, for any contracts awarded as a result of this RFP. Please note, we recommend an amount under 1,040 hours. Temporary staff may not work a full six (6) months if they take time off. A bid of 1,040 hours before conversion would likely disqualify Assigned Temporary Personnel from consideration for fulltime regular opportunities. 4. Describe the pay cycle (e.g. weekly, every two weeks, twice a month, etc.) for which your firm regularly pays its temporary staff for work performed. Describe the type (e.g. online timesheets) and general process of time reporting and obtaining manager or delegate approval for hours worked by Assigned Temporary Personnel. 5. Validation of overtime and/or holiday pay will require a second approval, in addition to regular approval of a timesheet. Describe how your firm will handle a two-step approval requirement for overtime, holiday pay, emergency pay, and working on holidays for Assigned Temporary Personnel (e.g. pop-up window displayed for supervisor to enter initials or mark yes/no that OT or holiday hours were actually worked, or via email from a secondary approver). | | |
| **Part III – Timely submission of reporting:** The Judicial Council requires detailed reporting on a monthly and quarterly basis for all temporary staffing. The reports should be in the latest version, or one version previous, of Microsoft Excel and include data such as, but not limited to: full name of Assigned Temporary Personnel, the Judicial Council or Participating JBE unit, office, location in which the Assigned Temporary Personnel worked or is working, start and end dates (or anticipated end date), billing rate, classification title, funding source, total regular hours worked, total approved overtime hours worked, and total amount invoiced, etc.   1. Provide a list of reports that your firm has the ability to readily produce for the Judicial Council. 2. Describe the process required and standard timeframe needed to request any ad hoc reports your firm offers and a brief description of the report(s). Note: The Judicial Council’s fiscal year is July 1 to  June 30.   For all reports listed, please note whether these reports custom or if they are currently available. | | |

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| **Reference #** | **Evaluation Criterion:** | **Staffing Industries & Classification Titles** |
| **9-B** | **Maximum Points for this Criterion:** | \_\_\_20 Points\_\_\_\_ (out of 100 possible points) |
| **Proposal Requirements:** Demonstrate the breadth and depth of Proposer’s ability to fill the Judicial Council’s temporary staffing requirements for Classifications listed in Attachment 2, Appendix E. | | |
| **Proposer must complete the following:** | | |
| **Part I –** Proposers must:   1. Describe your firm’s areas of expertise in various staffing industries (i.e., Accounting, Government, Legal, etc.) 2. Describe your firm’s recruiting, screening, and hiring processes for Assigned Temporary Personnel. 3. In percentages, describe your firm’s retention rate for Assigned Temporary Personnel over the last three (3) years. Include a description of the processes (if applicable) to increase this percentage over the next two (2) years. 4. Describe your firm’s process for managing your temporary employees. 5. Does your firm provide any benefits, such as, medical, dental, 401K, paid holidays, vacation to your temporary employees? If so, provide a summary of these benefits your firm offers and the requirements for temporary staff to obtain such benefits. 6. Describe your process that you will use to proactively source, recruit and maintain a network of qualified candidates for the Judicial Council and/or Participating JBE’s consideration. 7. Selected bidders will be responsible for providing their temporary employee(s) with policy information from the Judicial Council and any Participating JBE’s regarding overtime pay, holiday pay, emergency pay, and working on holidays, in addition to requirements for dress code, hours of work, days of work, calling out for unexpected absences or lateness, and requesting time off in advance. The Judicial Council’s policy information will be provided to those firms who are awarded a Master Agreement. Describe your process of providing or setting expectations with your employee(s) before they are placed on assignment. 8. Describe the types of positions most commonly filled, and the types of positions you have the means to fill. Attachment 2, Appendix E, Classifications, sets forth the descriptions of the Judicial Council’s frequently requested temporary positions. Describe your firm’s successes and obstacles in filling similar orders. Indicate the number of placements you’ve secured in the last 12-months per job classification listed in Attachment 2, Appendix E, Classifications including your use of subcontracted firms to make a placement. In the event that your placement classifications differ from the list included in Attachment 2, Appendix E, Classifications, account for your placements in the most equivalent Judicial Council classification. 9. Describe your existing subcontracting relationships with other firms, include details such as, the Classification Titles they can provide; how long has your firm has had a relationship with them, etc. 10. From the Classification Titles listed in Attachment 2, Appendix E, which titles, if any, have you found to be hard to fill over the last year. 11. Describe how you source those hard-to-fill positions. For example, do you engage firms that you currently have a Subcontractor relationship with; do you use social media to search for personnel, some other strategy? 12. Describe previous use of function-specific subcontractor(s) to fill niche or “hard-to-fill” positions and include time requirements expected before use of function-specific subcontractors can be requested by the Judicial Council. 13. Describe your firm’s affiliation, partnership or direct access to other function-specific staffing firms’ specialty or niche talent pool (e.g., construction, real estate, legal professionals, engineering, etc.). | | |
| **Part II – References:** Using the table below, provide three (3) client references for whom the Proposer has conducted similar services. The Judicial Council 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 Judicial Council reserves the right to use the information gained from the reference Company in the evaluation process.  **Reference #1**  Name of Organization:  Address:  City:  State:  Zip Code:  Contact Person:  Phone:  Email:    Describe in general the services your firm provided to this reference. Include the term and dollar value of the contract.  \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*  **Reference #2**  Name of Organization:  Address:  City:  State:  Zip Code:  Contact Person:  Phone:  Email:    Describe in general the services your firm provided to this reference. Include the term and dollar value of the contract.  **Reference #3**  Name of Organization:  Address:  City:  State:  Zip Code:  Contact Person:  Phone:  Email:    Describe in general the services your firm provided to this reference. Include the term and dollar value of the contract. | | |

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| **Reference #** | **Evaluation Criterion:** | **Key Staff** |
| **9-C** | **Maximum Points for this Criterion:** | \_\_\_10 Points\_\_\_\_ (out of 100 possible points) |
| **Proposal Requirements:** Proposers must designate certain highly experienced and qualified individuals in their respective subject matter areas as Key Staff to function in specified roles and serve as consistent, accessible, single points of contact to support Judicial Council or Participating JBE’s in filling temporary assignment requests under a resulting Master Agreement. | | |
| **Proposer must complete the following:** | | |
| **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), i.e., President, CFO, Account Manager, Recruiter or Sourcing; Billing or Accounting representative. The following positions have been designated as Key Staff: (1) Sourcing Manager, (2) Account Representative, and (3) Accounting Lead. Identify which Key Staff will be the single point of contact (Account Manager) for the Judicial Council in the day-to-day administration of the contract. | | |
| **Part II – Resumes:** Provide detailed and complete resumes documenting the background and professional expertise of each individual that Proposer would present to be a designated Key Staff member in a subsequent Master Agreement (if awarded to Proposer). Key Staff names and positions will be incorporated into the Master Agreement, if awarded. | | |
| **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 (2) 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. | | |
| **Part IV – 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. | | |

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| **Reference #** | | **Evaluation Criterion:** | **Proposer’s Acceptance of Judicial Council Master Agreement Terms and Conditions** |
| **9-D** | | **Maximum Points for this Criterion:** | \_\_\_15 Points\_\_\_\_ (out of 100 possible points) |
| **Proposal Requirements:** Proposers must either indicate acceptance of the Judicial Council Master Agreement Terms and Conditions, as set forth in Attachment 2, or clearly identify exceptions to the Judicial Council Master Agreement Terms and Conditions.  **If exceptions are identified, proposers must also submit**:   * + - 1. a red-lined version of Attachment 2, using track changes in Word or PDF format, that clearly tracks all proposed changes (additions, deletions, or any revised language) to the attachment, and       2. a written summary to substantiate each individual exception or proposed change, including  1. the relevance of the change, 2. the Proposer’s explanation and rationale for proposing the change, and 3. the proposed benefit to the Judicial Council and/or Participating JBE’s for accepting such individual change.   **Please note any exceptions or modifications of the Terms and Conditions not included in this Proposal or received after the Submission Deadline will not be considered.** | | | |
| **Proposer must complete the following:** | | | |
| Mark the appropriate choice, below *[you must mark one or the other]*: | | | |
|  | Proposer accepts *Attachment 2 – Judicial Council Master Agreement Terms and Conditions*, **without exception**. | | |
| **OR** |  | | |
|  | Proposer proposes the following exceptions or changes to *Attachment 2 – Judicial Council Master Agreement Terms and Conditions*: | | |
| **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) explanation and rationale for proposing the change and (iii) proposed benefit to the Judicial Council and/or Participating JBE’s for accepting such individual change.]**:** | | | |

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| **Reference #** | **Evaluation Criterion:** | **Viability of Firm** |
| **9-E** | **Maximum Points for this Criterion:** | \_\_\_7 Points\_\_\_\_ (out of 100 possible points) |
| **Proposal Requirements:** Proposers must demonstrate that they are a stable, long-term viable business entity that provides temporary staffing 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 temporary staffing services 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 whether your firm is licensed to do business in California and confirm whether you have the ability to pay your temporary staff that work in California. 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 2021. Provide a statement of any bankruptcies filed by the Proposer and any lawsuits 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.  Copies of the Proposer’s (and any subcontractors’) current business licenses, professional certifications, or other credentials. | | |
| **Part II – Financial Stability:** Provide the latest 3-years of financial reports (audited financials, if available; if audited financials are not available, then reviewed financials will be acceptable). *NOTE:* ***For privately held companies only****, the Judicial Council deems the included financial reports to be the company’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.* | | |

*End of Attachment 9*