

# WORK ORDER REQUEST FORM (WORF)

## Managed Services

**(To Be Filled in by Master Agreement Holder)**

<b>MASTER AGREEMENT CONTRACTOR'S NAME:</b>	
<b>MASTER AGREEMENT #:</b>	
<b>CANDIDATE'S NAMES:</b>	

## Part 1 - Requirements

**(To Be Filled in by JBE)**

<b>WOLF #:</b>	
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<b>1. Position Classification:</b>			
<b>2. # of Positions of this Classification being Solicited by this WORK</b>			
<b>3. Region of Work Order</b>	(Northern, Bay, Central or Southern)		
<b>4. Project Title:</b>			
<b>5. Summary of WORK</b>	<p>Specific business requirements and high-level technical requirements:</p>          <p>Service Level Requirements:</p>          <p>Software/Hardware to be supported:</p>          		
<b>6. New Consultant Request of existing incumbent?</b>	<b>This is a NEW consultant request</b>	Yes/No	
	<b>There is an incumbent for this position</b>	Yes/No	
<b>7. Budgetary Limitations and Requirements</b>	<b>Maximum Hourly Rate</b>		<b>\$XXX.XX</b>
	<b>Maximum Annual Budget, excluding travel: (per position)</b>	Initial Term	\$
		First Option Term	\$
		Second Option Term	\$

	<b>Funding has been approved and specifically set aside for this WORF:</b>	Yes/No
	<b>Funding Reporting Structure, Project ID, and Activity ID</b>	
<b>8. Designated physical location (i.e., “Home Base,” if any, and whether any Work can be performed remotely (i.e., performing the Work at a specific physical location is not required):</b>		
<b>9. Travel (Note to JBEs, this should be rare)</b>	<b>Will Travel of key personnel to a physical location that is away from Home Base be required to perform the Work outlined?</b>	Will/Will not be required
	<b>Estimated Percentage of Time key personnel will be required to travel:</b>	%
	<b>Anticipated travel destinations:</b>	
	<b>Estimated amount for reimbursable travel:</b>	\$
<b>10. Equipment Requirements</b>	<b>Will candidate be required to provide mobile phone for project purposes?</b>	Yes/No
	<b>Will candidate be required to provide laptop and software necessary to perform tasks and deliverables?</b>	Yes/No
	*Note: If Candidate is required to provide laptop, then laptop must be configured with full disk encryption software to protect any agency data stored on the laptop. Support for all software installed on personal laptops, including encryption software, will be provided by vendor. Required laptop software includes Adobe Acrobat Reader, WinZip 14.5 or newer, and Microsoft Word, Excel, Project and Visio 2010 or newer.	
<b>11. Duration of Assignment:</b>	<b>Start Date of Assignment:</b>	
	<b>Term of the WORF (including any Option Terms):</b>	<b>Maximum Hours Per Term</b>
	<b>WORF Initial Term:</b>	xx/xx/xxxx – xx/xx/xxxx
	<b>WORF 1st Option Term:</b>	xx/xx/xxxx – xx/xx/xxxx
	<b>WORF 2nd Option Term:</b>	xx/xx/xxxx – xx/xx/xxxx
<b>3. Maximum number of Candidates the Proposer may propose for this WORF:</b>		
<b>4. Clarification of WORF:</b>	<b>Due Date and Time for Clarifying Questions to be Submitted to:</b>	x:00pm Pacific xx/xx/xxxx
	<b>Estimated Date JBE will communicate responses of clarifying questions to prospective proposers:</b>	xx/xx/xxxx
<b>5. Electronic copy of WORF Proposal Due Date and Time:</b>		x:00pm Pacific xx/xx/xxxx

<b>6. Deliver electronic copy of WORF Proposal to:</b>		<b>[JBE to provide email address or electronic destination)</b>
<b>7. Interview of top-ranked candidates to discuss offer:</b>	<b>Estimated Interview Window Timeframe for Top-Rated Candidates:</b>	xx/xx/xxxx – xx/xx/xxxx
	<b>Interview Location:</b>	Initial phone interviews may be conducted. Final interviews will be online or at the JBE location.
<b>8. Minimum Job-Specific Skills/Qualifications Required for each Classification (in order of relative importance):</b> <ul style="list-style-type: none"> <li></li> </ul>		
<b>9. Additional Skills/Qualifications Desired for each Classification:</b> <ul style="list-style-type: none"> <li></li> </ul>		
<b>10. Evaluation Criteria for this WORF</b>		
<b>Criteria</b>	<b>Description</b>	<b>Points (Possible Out of 100)</b>
A. Specialized expertise and technical competence	Proposals will be evaluated based on the proposer's demonstrated ability to meet the required/desired qualifications for the applicable position. <i>(Note: desired additional skills/qualifications are by definition not required of a candidate, and as such shall make up no more than five (5) points of the possible points for this evaluation criteria.)</i>	20
B. Past record of performance	Proposals will be evaluated considering candidate's past performance on projects of similar scope and duration.	20
C. Ability to meet requirements of the project	Proposals will be evaluated in terms of compliance with proposed project scheduling.	20
D. Reasonableness of cost projections	Proposals will be evaluated in terms of reasonableness of cost, proposed rate structure for the position, including breakdown of salary, overhead and profit.	40

#### 11. Tasks and Responsibilities to be Performed

Task No.	Description of Tasks and Responsibilities for each Classification
1	
2	
3	
4	
5	
6	
7	
8	

#### 12. Deliverables To Be Provided for WORF Initial Term (for each Classification)

Term	No.	Description of Deliverable	Due Date	Hours
WORF Initial Term	1			
WORF Initial Term	2			
WORF Initial Term	3			
WORF Initial Term	4			
WORF Initial Term	5			

Term	No.	Description of Deliverable	Due Date	Hours
WORF Initial Term	6			
WORF Initial Term	7			
WORF Initial Term	8			
WORF Initial Term	9			
WORF Initial Term	10			
WORF Initial Term	11			
WORF Initial Term	12			

**13. Deliverables To Be Provided for 1st Option Term (for each Classification)**

Term	No.	Description of Deliverable	Due Date	Hours
WORF 1st Option Term	13			
WORF 1st Option Term	14			
WORF 1st Option Term	15			
WORF 1st Option Term	16			
WORF 1st Option Term	17			
WORF 1st Option Term	18			
WORF 1st Option Term	19			
WORF 1st Option Term	20			
WORF 1st Option Term	21			
WORF 1st Option Term	22			
WORF 1st Option Term	23			
WORF 1st Option Term	24			

**14. Deliverables To Be Provided for 2nd Option Term (for each Classification)**

Term	No.	Description of Deliverable	Due Date	Hours
WORF 2nd Option Term	25			
WORF 2nd Option Term	26			
WORF 2nd Option Term	27			
WORF 2nd Option Term	28			
WORF 2nd Option Term	29			
WORF 2nd Option Term	30			
WORF 2nd Option Term	31			
WORF 2nd Option Term	32			
WORF 2nd Option Term	33			

Term	No.	Description of Deliverable	Due Date	Hours
WOLF 2nd Option Term	34			
WOLF 2nd Option Term	35			
WOLF 2nd Option Term	36			

**15. Additional Requirements:**

Note:

Prevailing wage Work requires compliance with DIR public works registration for Contractor and subcontractor(s)

DIR # \_\_\_\_\_.

Onsite installation Work (monitors, wiring, etc.) requires California contractor's license(s) for Contractor and subcontractor(s)

CSLB# \_\_\_\_\_.

*End of Work Order Request Form Part 1*

## Part 2 – Proposed Candidate Qualifications

(To Be Filled in by Proposer)

### 1. Specialized Expertise and Technical Competence

A. Minimum required job-specific skills/qualifications: (Provide a statement that demonstrates how the candidate meets each of the minimum required job-specific skills/qualifications specified in Part I. If selected for an interview, Candidate may be required to demonstrate proficiency in the minimum required job-specific skills/qualifications, including oral and written communication skills at both a technical and non-technical level.)

B. Desired job-specific skills/qualifications: (Provide a statement that demonstrates how the candidate meets the desired job-specific skills/qualifications specified in Part I. If selected for an interview, Candidate may be required to demonstrate proficiency in any claimed job-specific skill/qualification.)

C. Candidate's Resume: (Provide the candidate's resume (in unprotected Word format.)

## 2. Record of Past Performance

- A. Candidate's record of past performance: (Thoroughly and completely discuss the candidate's record of performance on past projects, especially on work with government agencies or public bodies, including such factors as quality of work, ability to meet schedules, cooperation, responsiveness, and other information technology considerations.)

- B. References: Provide references from at least three (3) companies/firms/agencies that candidate has performed similar services. The JBE may check with the references provided.)

### Reference #1

Job Classification for this Assignment	
Duration of Assignment (List Dates)	
*Project Title/Description of Assignment	
*Name of Company/Firm/Agency	
*Company Point of Contact (Name)	
*Email Address and Phone Number for Company Point of Contact	

### Reference #2

Job Classification for this Assignment	
Duration of Assignment (List Dates)	
*Project Title/Description of Assignment	
*Name of Company/Firm/Agency	
*Company Point of Contact (Name)	
*Email Address and Phone Number for Company Point of Contact	

### Reference #3

Job Classification for this Assignment	
Duration of Assignment (List Dates)	
*Project Title/Description of Assignment	
*Name of Company/Firm/Agency	
*Company Point of Contact (Name)	
*Email Address and Phone Number for Company Point of Contact	

## 3. Ability to Meet Requirements of the Project

- A. Date candidate is available to start:

- B. Candidate availability for the duration of the project including WORF Initial Term and all WORF Option Terms: (Proposer to include a statement of proposed candidate's availability during the WORF Initial Term and all WORF Option Terms for the project, including the ability to fulfill the hours specified in the Deliverables To Be Provided for WORF Initial Term, and any subsequent Option Term, of the WORF Part I. The statement must include a disclosure of any other JBE or non-JBE contracts for work which the proposed candidate is obligated to fulfill and identify the dates or conditions which result in periods of unavailability. The statement must also include any other anticipated periods of unavailability greater than five (5) consecutive business days during the WORF Initial Term. If there are no periods of unavailability, then it must be stated so.)

<p>C. Candidate's ability to complete the Work: (Proposer to include a statement of the proposed candidate's ability to complete the work within the project schedule set forth in Part I.)</p>
<p>D. Candidate's local presence to Home Base: (Proposer to include a statement of Candidate's place of residence during the Initial Term and all Option Terms.)</p> <p>D1. Candidate's city and state of residence during the Initial Term and all Option Terms*</p> <p><b>Note: *Failure to disclose this information will result in disqualification of the Candidate. Candidate must reside in the United States.</b></p>
<p>E. Candidate's right to work for the duration of the project including Worf Initial Term and all Worf Option Terms: (Proposer to include a statement regarding candidate's legal right to work in the United States, including type of visa, if any, and the visa's expiration date.)</p> <p><b>E1. Candidate requires a visa to work in the United States? Yes or No</b>  <b>E2. If visa is required, list expiration date: xx/xx</b></p>
<p>F. Candidate's ability to provide any required equipment: (Proposer to include a statement of candidate's ability to provide any required equipment set forth in Part I.)</p>

*End of Work Order Request Form Part 2*



# WORK ORDER REQUEST FORM (WORF)

## Managed Services

### Part 3 – Proposed Costs

(To Be Filled in by Proposer)

#### 1. Reasonableness of Cost Projections

A. How do you classify this candidate within your organization? Employee, independent contractor, subcontractor or other? If other, please specify.	
B. Is candidate an employee/independent contractor or proposer? Fill-in “Yes” or “No” in the box at right. If answer is “No” please provide the company name of the subcontractor in the box below labeled “B”	Yes / No

**Table 1**

		WORF Initial Term	WORF Option Year 1	WORF Option Year 2
		Amount	Amount	Amount
Hourly Rate for Classification - (insert a row for each Classification)				

#### Subcontractor

C. If candidate is NOT an employee/independent contractor of Proposer, but is being made available by a company / firm subcontracted by proposer, indicate name of the subcontracted company / firm	Subcontracted company / firm's name
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#### Important:

Any WORF proposals in excess of your contract's Exhibit 2, Maximum Hourly Rate or the Maximum Hourly Rate listed in Part 1, Item 6 of this WORF, will be deemed non-responsive.

#### 2. Proposer's Point of Contact for Scheduling Candidate Interviews

<b>Point of Contact's Name</b> <i>(Note: this must be a specific individual &amp; not a general mailbox):</i>	
<b>Point of Contact's Phone Number:</b>	
<b>Point of Contact's Email Address</b> <i>(Note: this must be a specific individual email address &amp; not a general mailbox):</i>	

### 3. Proposer's Signature

<b>Authorized Signature:</b>	
<b>Printed Name and Title of Person Signing</b>	
<b>Date:</b>	
<b>Proposer's Address:</b>	

*End of Work Order Request Form Part 3*