

Department of

Registrar-Recorder/County Clerk

REQUEST FOR PROPOSALS –

PHASE 2 PROPOSAL EVALUATION AND CONTRACTOR SELECTION

TECHNICAL PROPOSAL RESPONSE TEMPLATE

FOR

VOTING SOLUTIONS FOR ALL PEOPLE

(VSAP) IMPLEMENTATION AND SUPPORT SERVICES

RFP Phase 2 of 2: #17-008

January 2, 2018

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Prepared By

County of Los Angeles

Registrar-Recorder/County Clerk- Contracts Section Room 5115

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# Cover Page

**Instructions: The Proposer must include the following Cover Page on each copy of the Technical Proposal. An individual authorized to legally bind the Proposer must sign the Cover Page in blue ink and include it in the Proposal copy labeled “ORIGINAL.” The additional copies of the Technical Proposal may include a photocopied version of the signature.**

Provide the following information about this RFP Phase 2 and the Proposer.

|  |  |
| --- | --- |
| RFP Title | REQUEST FOR PROPOSALS – PHASE 2 PROPOSAL EVALUATION AND CONTRACTOR SELECTION FOR VOTING SOLUTIONS FOR ALL PEOPLE (VSAP) IMPLEMENTATION AND SUPPORT SERVICES |
| RFP Number | 17-008 |
| Proposer (Company) Name |  |
| Proposer Mailing Address |  |
|  |
| Date of Proposal |  |

Provide the following information regarding the person responsible for the completion of the Proposer’s response. This person should also be the person the County will contact for questions and/or clarifications.

|  |  |  |  |
| --- | --- | --- | --- |
| Name |  | Title: |  |
| Company Name: |  | Phone Number: |  |
| Mailing Address: |  | E-mail Address: |  |
|  |  |

Subject to acceptance by the County, the Proposer acknowledges that by submitting a response AND signing in the space indicated below, the Proposer is submitting a formal offer to meet the requirements and intent of the VSAP Solicitation. In addition, should a contract result from this RFP Phase 2 with said Proposer, the Proposer shall be contractually obligated to comply with all items in this RFP Phase 2. While the Proposer is directed to list exceptions, all such exceptions shall be subject to the County’s acceptance and/or further negotiation. If no exceptions are noted, none will apply. The Proposer agrees further that it will not take any exceptions later to any item agreed to with this submission. Failure to sign the Cover Page or signing it with a false statement shall void the submitted response and any resulting contract(s).

By signature hereon, the Proposer certifies that:

1. All statements and information prepared and submitted in response to this RFP Phase 2 are current, complete and accurate.
2. The proposed solution meets all the requirements of this RFP Phase 2 and the stated intentions of the VSAP Program.
3. The Proposer will comply with all Federal and State laws, rules and regulations that are in force currently or anytime during the term of a resulting contract.
4. The company or companies represented here is/are authorized dealer(s) in good standing of the products/services included in this response.
5. The Proposer and its principals are eligible to participate in this transaction and have not been subjected to suspension, debarment or similar ineligibility determined by any Federal, State or local governmental entity and that the Proposer is in compliance with the County rules relating to procurement.
6. The Proposer is committed to do the work if selected.
7. The Proposer will maintain any permits, licenses and certifications required to perform the work.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ / \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Original signature** of individual authorized to legally bind the Company / Date

|  |  |
| --- | --- |
| Name |  |
| Title, Company Name: |  |
| D&B Hoovers Company Profile Name *(if different than above)* |  |
| Mailing Address: |  |
|  |  |

# Cover Letter

|  |
| --- |
| The Proposer must also provide the following information as part of the Cover Letter:   * A statement regarding the Proposer’s legal status, tax identification number and principal place of business with applicable W-9 forms (<http://www.irs.gov/pub/irs-pdf/fw9.pdf>) attached. * A list of all Subcontractors, if any, that the Proposer will use on the products and services included in this RFP Phase 2 if the County selects the Proposer. * An attestation that all members of the Proposer-Led Team are organized, and have offices, in the United States. No Parent Company of any member of the Proposer-Led Team may be incorporated in any of the prohibited countries as defined in RFP Phase 1. Parent Companies may have other Subsidiaries incorporated in prohibited countries, but any such Subsidiaries must have no control of, or influence on, any member of the Proposer-Led Team. * A statement that the Proposer agrees to develop and hold all software in the United States. * A statement that the Proposer agrees to County ownership of all existing County IP and IP developed as work for hire as a result of the contract. * For each proposed Subcontractor, the Proposer must attach a letter from the Subcontractor, signed by an individual authorized to legally bind the Subcontractor, with the following included in the letter:   + - The Subcontractor’s legal status, tax identification number and principal place of business address     - The name, title, phone number, e-mail address and mailing address of a person who is authorized to legally bind the Subcontractor to contractual obligations     - A description of the work the Subcontractor will do     - A commitment by the Subcontractor to do the work assigned to it in the Proposal if the Proposer is selected     - A statement that the Subcontractor has read and understood this RFP Phase 2 and will comply with its requirements     - A statement that the Subcontractor will maintain any permits, licenses and certifications required to perform its portion of the work     - A statement that the Subcontractor agrees to County ownership of all existing County IP and IP developed as work for hire as a result of the contract.   **Instructions:** Provide a Cover Letter that includes the information required above. |

<Response>

# Table of Contents

|  |
| --- |
| **Instructions: Provide a Table of Contents for the Proposal. This should include all parts of the Proposal, including response forms and attachments, and should be identified by volume and page number. The structure of the Proposal should match the structure of the Response Template for ease of Proposal evaluation. The Table of Contents should identify all sections, figures, charts, graphs, etc.** |

<Response>

# Section A. Executive Summary

|  |
| --- |
| **Instructions: Provide a brief (five (5) to ten (10) page) summary of the key aspects of the Proposer’s Technical Proposal. The Executive Summary should include an overview of the Proposer’s approach to deliver the scope described in this RFP Phase 2, qualifications, experience, proposed team and advantage of this Proposal to the County.** |

<Response>

# Section B. Proposer-Led Team Qualifications

## Section B.1. Proposer-Led Team’s Background and Experience

* + 1. Team Experience and Plans for Collaboration

|  |
| --- |
| **The Proposer must provide the County with an understanding of the Proposer-Led Team’s experience to provide relevant context about the organization that will be providing the products and services outlined in this RFP** Phase 2**, as well as how the Team will successfully collaborate while providing the products and services.**  **Instructions: Describe the Proposer-Led Team’s relevant experience as it relates to projects similar to the products and services described in this RFP** Phase 2**. Explain why this Team was assembled in its current form — including the experience provided by each included organization and any experience the entities have working together. Discuss how this Team will collaborate successfully on the products and services outlined in this RFP** Phase 2**.** |

<Response>

* + 1. Work Locations

|  |
| --- |
| The **“Key Personnel”** associated with the products and services outline in this RFP Phase 2 must be available to participate in person for meetings as scheduled by the County during normal business hours, Monday through Friday 9:00 AM to 5:00 PM PST, except Federal, State and County holidays.  At no time shall the Proposer-Led Team maintain, use, transmit or cause to be transmitted information governed by privacy laws and regulations outside of the United States and its territories.  **Instructions:** Describe the locations where the Proposer-Led Team proposes performing work associated with the Scope of Work of this RFP Phase 2. If the location(s) for a specific task changes during the contract term, provide a timeline reflecting where the task will be performed during each time period. Identify the Proposer-Led Team’s expectations for space requirements at the County’s facilities, if any. |

<Response>

* + 1. Existing Business Relationships with the County of Los Angeles

|  |
| --- |
| **Instructions:** Describe any existing or recent (within the last five (5) years) business relationships the Proposer or any of its Affiliates and proposed Subcontractors have with the County of Los Angeles. |

<Response>

## Section B.2. Proposer’s References

|  |
| --- |
| Include at least three (3) references that clearly demonstrate the Proposer’s ability to perform the VSAP Scope of Work (Appendix A) described in this RFP Phase 2. The Proposer may not use itself or any of the other entities that are part of the Proposal as reference organizations.  **Instructions: Provide the information requested in the Tables below. The Tables may be replicated if the Proposer would like to include more than three (3) references.** Do not change any of the pre-populated sections. Any changes to the pre-populated sections could lead to the disqualification of the Proposal. |

1. Reference 1

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PROPOSER INFORMATION** | | | | | |
| Proposer Name: | | Proposer Contact Name: | | | |
| Proposer Contact Phone Number: | | | |
| **CLIENT INFORMATION** | | | | | |
| Client Organization: | | Client Contact Name: | | | |
| Client Phone Number: | | | |
| Client Mailing Address: | | Client E-mail Address: | | | |
| **PROJECT INFORMATION** | | | | | |
| Total Proposer Staff: |  | | | |
| Project Objectives: | | | | | |
| Project Description: | | | | | |
| Proposer’s Involvement: | | | | | |
| **PROPOSER KEY PERSONNEL ASSIGNED TO PROJECT** | | | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| **PROJECT MEASUREMENTS** | | | | | |
| Operating Budget of Client Organization: | | # of Users: | | | |
|  | |  | | | |
| Original Value of Proposer’s Contract: | | Actual Total Contract Value: | | | |
| Reason(s) for Change in Value: | | | | | |
|  | |  | | | |
| Estimated Start & Completion Dates From: | |  | To: |  | |
| Actual Start & Completion Dates From: | |  | To: |  | |
| Reason(s) for Difference Between Estimated and Actual Dates: | | | | | |
|  | | | | | |
| If the Proposer performed the work as a subcontractor, the Proposer must describe the scope of subcontracted activities: | | | | | |

1. Reference 2

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PROPOSER INFORMATION** | | | | | |
| Proposer Name: | | Proposer Contact Name: | | | |
| Proposer Contact Phone Number: | | | |
| **CLIENT INFORMATION** | | | | | |
| Client Organization: | | Client Contact Name: | | | |
| Client Phone Number: | | | |
| Client Mailing Address: | | Client E-mail Address: | | | |
| **PROJECT INFORMATION** | | | | | |
| Total Proposer Staff: |  | | | |
| Project Objectives: | | | | | |
| Project Description: | | | | | |
| Proposer’s Involvement: | | | | | |
| **PROPOSER KEY PERSONNEL ASSIGNED TO PROJECT** | | | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| **PROJECT MEASUREMENTS** | | | | | |
| Operating Budget of Client Organization: | | # of Users: | | | |
|  | |  | | | |
| Original Value of Proposer’s Contract: | | Actual Total Contract Value: | | | |
| Reason(s) for Change in Value: | | | | | |
|  | |  | | | |
| Estimated Start & Completion Dates From: | |  | To: |  | |
| Actual Start & Completion Dates From: | |  | To: |  | |
| Reason(s) for Difference Between Estimated and Actual Dates: | | | | | |
|  | | | | | |
| If the Proposer performed the work as a subcontractor, the Proposer must describe the scope of subcontracted activities: | | | | | |

1. Reference 3

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PROPOSER INFORMATION** | | | | | |
| Proposer Name: | | Proposer Contact Name: | | | |
| Proposer Contact Phone Number: | | | |
| **CLIENT INFORMATION** | | | | | |
| Client Organization: | | Client Contact Name: | | | |
| Client Phone Number: | | | |
| Client Mailing Address: | | Client E-mail Address: | | | |
| **PROJECT INFORMATION** | | | | | |
| Total Proposer Staff: |  | | | |
| Project Objectives: | | | | | |
| Project Description: | | | | | |
| Proposer’s Involvement: | | | | | |
| **PROPOSER KEY PERSONNEL ASSIGNED TO PROJECT** | | | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| **PROJECT MEASUREMENTS** | | | | | |
| Operating Budget of Client Organization: | | # of Users: | | | |
|  | |  | | | |
| Original Value of Proposer’s Contract: | | Actual Total Contract Value: | | | |
| Reason(s) for Change in Value: | | | | | |
|  | |  | | | |
| Estimated Start & Completion Dates From: | |  | To: |  | |
| Actual Start & Completion Dates From: | |  | To: |  | |
| Reason(s) for Difference Between Estimated and Actual Dates: | | | | | |
|  | | | | | |
| If the Proposer performed the work as a subcontractor, the Proposer must describe the scope of subcontracted activities: | | | | | |

Subcontractor References (If applicable)

|  |
| --- |
| If the Proposal includes the use of Subcontractor(s), include at least one (1) reference for each proposed Subcontractor from a project with a scope of work equivalent to the scope of work proposed of the Subcontractor in the Proposal. The reference chosen should clearly demonstrate the Subcontractor’s ability to perform the relevant portion of the Proposal. The Subcontractor may not use itself or any of the other entities that are part of the Proposal as reference organizations.  **Instructions: Provide the information requested in the Table below. Replicate the Table if more than one (1) reference is desired.** Do not change any of the pre-populated sections. Any changes to the pre-populated sections could lead to the disqualification of the Proposal. |

1. Subcontractor Reference 1

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **SUBCONTRACTOR INFORMATION** | | | | | |
| Subcontractor Name: | | Subcontractor Contact Name: | | | |
| Subcontractor Contact Phone Number: | | | |
| **CLIENT INFORMATION** | | | | | |
| Client Organization: | | Client Contact Name: | | | |
| Client Phone Number: | | | |
| Client Mailing Address: | | Client E-mail Address: | | | |
| **PROJECT INFORMATION** | | | | | |
| Total Subcontractor Staff: |  | | | |
| Project Objectives: | | | | | |
| Project Description: | | | | | |
| Subcontractor’s Involvement: | | | | | |
| **SUBCONTRACTOR KEY PERSONNEL ASSIGNED TO PROJECT** | | | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| Name: (Add more rows as needed) | | Role: (Add more rows as needed) | | | |
| **PROJECT MEASUREMENTS** | | | | | |
| Operating Budget of Client Organization: | | # of Users: | | | |
|  | |  | | | |
| Original Value of Proposer’s Contract: | | Actual Total Contract Value: | | | |
| Reason(s) for Change in Value: | | | | | |
|  | |  | | | |
| Estimated Start & Completion Dates From: | |  | To: |  | |
| Actual Start & Completion Dates From: | |  | To: |  | |
| Reason(s) for Difference Between Estimated and Actual Dates: | | | | | |

## Section B.3. Proposer’s Financial Capability

* + 1. Financial Information

|  |
| --- |
| The Proposer must submit an Independent Auditor’s Report and audited financial statements, including any management letters associated with the Auditor’s Report with the applicable notes for the last three (3) fiscal years, balance sheet, income statement and statement of changes in financial position.  If the Proposer has not had an audit conducted within the past three (3) fiscal years, then the Proposer must provide the following un-audited financial statements for the last three (3) fiscal years:   1. Balance Sheet 2. Income Statement 3. Statement of Changes in Financial Position   If the Proposer is a corporation that is required to report to the Securities and Exchange Commission (SEC), it must submit its two (2) most recent SEC Form 10-K Annual Reports. If any change in ownership is anticipated in the twelve (12) months following the Proposal due date, the Proposer must describe the circumstances of such change and indicate when the change is likely to occur.  Additional information may be requested regarding financial stability for the Proposer and any Subcontractors proposed.  **Instructions:** Supply evidence of financial stability sufficient to demonstrate reasonable stability and solvency appropriate to the requirements of this solicitation. Provide (as part of the Technical Proposal) on a separate USB labeled “Financial Information Section B.3,” the Proposer’s most current financial statements and any applicable SEC Form 10-K, all as described above. Financial statements will be kept confidential to the best of the County’s ability if each page is stamped confidential.  Include below a Table of Contents of all the materials contained on the USB. |

<Response>

* + 1. Performance Guarantee

|  |
| --- |
| The County may elect to require a Proposer to obtain a Performance Bond, potentially up to the implementation cost of the contract, prior to or at the time of contract signing that may result from this RFP Phase 2.  **Instructions: Provide a statement that the Proposer will obtain a Performance Bond if required by County.** |

<Response>

## Section B.4. Proposer’s Pending Litigation and Judgments

|  |
| --- |
| The Proposer must inform the County of any pending litigation or judgments in which it is involved that are relevant to the scope of this VSAP Solicitation (e.g., litigation or judgments related to intellectual property).  **Instructions: Identify by name, case and court jurisdiction any litigation still pending in which the Proposer is involved and judgments against the Proposer in the past ten (10) years that are relevant to the scope of this VSAP Solicitation. Provide a statement describing the size and scope of any pending or threatened litigation against the Proposer or principals of the Proposer that is relevant to the scope of this VSAP Solicitation.** |

<Response>

# Section C. Proposer’s Approach to Provide Required Services

|  |
| --- |
| **Instructions: Read Appendix A (Scope of Work) and provide Proposer’s detailed response in the designated areas that describe how Proposer will perform and meet the required services.** All areas of the Scope of Work must be addressed and, if the Proposer is selected, performed by a member of the Proposer-Led Team.  **Provide** Section C (Proposer’s Approach to Provide Required Services**) as an Attachment to the Technical Proposal.** |

Attachment Location

# Section D. Proposer-Led Team Organization and Staffing

* + 1. Project Organization and Staffing Plan

|  |
| --- |
| The Proposer must describe the Project organization and staffing plan that will execute the proposed approach and create the required deliverables. The Plan should be a balanced complement of Proposer-Led Team and VSAP Program resources. This section must include details of the Proposer’s team, proposed use of Subcontractors, the Proposer’s expectations of VSAP Program resources and the Proposer’s expectations of other VSAP Program-related contractors (e.g., Partner Support and other contractors responsible for components that will be part of Proposer’s systems integration). This section should include a visual representation of the Proposer-Led Team and its relationship to the VSAP Program staff organization with reporting structures.  **The Proposer also must specifically d**escribe the staffing across all the resources described above (for County, the Proposer-Led Team and other non-County resources) that is required to support the creation of all deliverables. The Plan must include the number of resources (both business and technical), anticipated role and responsibilities, level of participation (density of time on the Project) and necessary capabilities/skills.  Key Personnel identified in the Proposal for the Project are considered to be critical resources and are therefore expected to be the major participants in all solicitation (e.g., oral presentations) and Project activities. If the Proposer is selected, its Key Personnel cannot be replaced without prior County approval during the life cycle of the Project.  **Instructions:** Provide a Staffing Plan and associated organization chart detailing the number of personnel, levels, roles and responsibilities and team reporting relationships within the Proposer-Led Team. The Staffing Plan should suggest an approach for key VSAP Program staff to work “shoulder-to-shoulder” with the Proposer’s staff. The Staffing Plan also should identify all Key Personnel for the Proposer and their proposed Project roles. |

<Response>

* + 1. Maintenance and Support Organization and Staffing Plan

|  |
| --- |
| The Proposer must describe the Maintenance and Support (M&S) Organization and Staffing Plan required to support the VSAP Solution as defined in this RFP Phase 2. This section must include details of the Proposer’s team, proposed use of Subcontractors and the Proposer’s expectations of VSAP Program resources. This section should include a visual representation of the Proposer-Led Team and its relationship to the VSAP Program staff organization with reporting structures. The Plan also must include the number of resources (both business and technical), anticipated role and responsibilities, level of participation (density of time on M&S activities) and necessary capabilities/skills.  Key Personnel for M&S are considered to be the central resources and are therefore expected to be the major participants in all solicitation (e.g., oral presentations) and M&S activities. If the Proposer is selected, its Key Personnel for M&S cannot be replaced without prior County approval during the life cycle of Maintenance and Support.  **Instructions:** Provide a Staffing Plan and associated organization chart detailing the number of personnel, levels, roles and responsibilities, and team reporting relationships for M&S. Identify all Key Personnel for M&S for the Proposer, personnel for the County and their proposed roles. |

<Response>

* + 1. Proposer’s Key Personnel

|  |
| --- |
| The Proposer must identify Key Personnel for the products and services outlined in this RFP Phase 2 including Subcontractors, if applicable, as described in this RFP Phase 2. This includes:   * Organization * Name * Title in the organization * Proposed role including applicable components and/or services * Role in the last three (3) projects * A description of any past work the applicable individual has performed with other members of the Proposer-Led Team or their staff   This section also should detail the past work each listed person has had with the other organizations or their staff.  **Instructions: Complete the following Table detailing the Key Personnel identified for this the products and services outlined in this RFP Phase 2. Add rows as necessary.** Do not change any of the pre-populated sections. Any changes to the pre-populated sections could lead to the disqualification of the Proposal. |

1. Proposer’s Key Personnel

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ORGANIZATION** | **NAME** | **TITLE IN ORGANIZATION** | **PROPOSED ROLE ON PRODUCTS/SERVICES** | **% OF TIME FOR THAT WORK EFFORT** | **ROLE IN LAST 3 PROJECTS** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

* 1. 1. Staff Experience

The Proposer must provide two (2) completed Staff Experience references for each identified and proposed Key Personnel as indicated in this RFP Phase 2 (including both the Proposer and Subcontractor staff). If references are available for multiple projects with a similar project scope, size and complexity, the County would prefer Public Sector or Public Agency references.

**Instructions:** Indicate, for each project experience listed, the client name and client contact information, whether the project was for a public sector agency, the project name, start and end dates that the team member performed the role, duration of the experience and whether the project included design and development, manufacturing, implementation services and/or M&S. Duplicate Table 6 in its entirety, once per each individual included in the proposed Key Personnel. Do not change any of the pre-populated sections. Any changes to the pre-populated sections could lead to the disqualification of the Proposal.

1. Staff Experience

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Team Member Name: | | |  | | | | | | | |
| **Description of Skill Sets and Experience** | | |  | | | | | | | |
| **Proposed Project Role** | | |  | | | **Subcontractor (Y/N)?** | | | |  |
| **Years’ Experience in Proposed Role:** | | |  | | | | | | | |
| **REFERENCES** | | | | | | | | | | |
| **REFERENCE 1** | | | | | | | | | | |
| **Client Organization** | |  | | | | | | | | |
| **Client Point of Contact** | |  | | | | | | | | |
| **Client Mailing Address** | |  | | | | | | | | |
| **Client Phone Number** | |  | | | | | | | | |
| **Client E-mail Address** | |  | | | | | | | | |
| **Project Name and Description** | |  | | | | | | | | |
| # of Employees | |  | | | Public Sector (Y/N)? | |  | | | |
| **Date/Duration of Team Member’s Involvement** | | **Start (MM/YYYY)** |  | | **End (MM/YYYY)** | |  | | | |
| **Design & Development (Y/N)?** | |  | **Manufacturing (Y/N)?** |  | **Implementation (Y/N)?** | |  | **M&S (Y/N)?** |  | |
| **Team Member’s Role on the Project** | |  | | | | | | | | |
| **REFERENCE 2** | | | | | | | | | | |
| **Client Organization** | |  | | | | | | | | |
| **Client Point of Contact** | |  | | | | | | | | |
| **Client Mailing Address** | |  | | | | | | | | |
| **Client Phone Number** | |  | | | | | | | | |
| **Client E-mail Address** | |  | | | | | | | | |
| **Project Name and Description** | |  | | | | | | | | |
| # of Employees | |  | | | Public Sector (Y/N)? | |  | | | |
| **Date/Duration of Team Member’s Involvement** | | **Start (MM/YYYY)** |  | | **End (MM/YYYY)** | |  | | | |
| **Design & Development (Y/N)?** | |  | **Manufacturing (Y/N)?** |  | **Implementation (Y/N)?** | |  | **M&S (Y/N)?** |  | |
| **Team Member’s Role on the Project** | |  | | | | | | | | |
| INDIVIDUAL QUALIFICATIONS | | | | | | | | | | |
| **Certifications (if applicable)** | | | | | | | | | | |
| PMI/PMP | Member ID#: | | | | | | | | | |
|  | Earned Date: | | | Expiration Date: | | | | | | |
| Other | Member ID#: | | | | | | | | | |
|  | Earned Date: | | | Expiration Date: | | | | | | |
|  |  | | |  | | | | | | |

* + 1. Resumes

The Proposer must attach professional resumes of all Proposer-Led Team personnel included in the organization charts (submitted above in Parts 1 and 2 of this Section D) to this section of the Technical Proposal.

Each resume must demonstrate experience germane to the position proposed. The resume should include work on projects cited under the Proposer’s corporate experience, and the specific functions performed on such projects.

**Instructions:** Provide a resume for each individual included in the submitted organization charts.

<Response>

* + 1. Staff Management and Contingency Plan

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| --- |
| The Proposer must describe policies and procedures regarding hiring, professional development and human resource management, including processes for ensuring that the VSAP Project will not be affected by fluctuations in the Proposer’s staffing and other project assignments. The response also should include a discussion of the Proposer’s management of Subcontractor staffing.  The Proposer must provide a contingency plan that shows the ability and process to add more staff if needed to ensure it can meet the Project’s deliverable due date(s) and implementation dates.  The Proposer must provide a description of its plan to monitor the Project, and how a determination to deploy contingency staff will be made. The Proposer’s response also must describe any variation relative to the five (5) years of M&S services to be provided after the Project.  **Instructions:** Provide a description of the Proposer’s Staff Management approach, for both Proposer’s staff and for Subcontractors’ staff. Provide a Staff Contingency Plan. |

<Response>

# Section E. Project Change Management Plan

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| The Proposer must describe its experience with project change management, including the strategy used for tracking, reviewing and approving project scope and schedule. The response must explain its approach to change management for the VSAP Project, noting any differences from the Proposer’s previous experience.  The Proposer must provide a sample change management plan for the VSAP Project.  **Instructions:** Provide a description of the Proposer’s experience with project change management and explain the approach to be used for the VSAP Project, including any reasons for deviation from Proposer’s previous practices (if applicable). Include a sample Project Change Management Plan. |

<Response>

# Section F. Project Schedule

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| **The Proposer must submit a schedule for the VSAP Project. This schedule should demonstrate that the** Proposer **has a thorough understanding of the Scope of Work and what must be done to satisfy and implement the Project requirements within the timelines expected by the County. The schedule must extend through at least the first year of M&S and clearly delineate what is included in a typical M&S year.**  The schedule should show all task details with responsibilities, timelines, durations, milestone dates and deliverables including respective BMD quantities; as well as all critical dependencies for the Project’s milestones and deliverables. The schedule must be an attachment to the Proposer’s Technical Proposal and tabbed as such in the submission. It also must be submitted as an electronic soft copy (Microsoft Project ® or equivalent and Adobe ® PDF) version in the Proposer’s electronic submission of the Technical Proposal.  All content should be formatted for effective viewing in printed and soft copy.  **Instructions:** Provide a schedule including at least:   * High level Project schedule including all Project deliverables and milestones * Detailed Project Plan with all activities, deliverables and milestones including respective BMD quantities * A listing of what staff is assigned responsibility for each deliverable within the WBS * Identification of deliverables that require acceptance, including the proposed acceptance period for the deliverable * Major milestones and target date(s) for each milestone that are consistent with the dates of this RFP Phase 2   Include or attach associated artifacts such as Gantt charts and flowcharts as appropriate. |

<Response>

# Section G. Proposer’s Green Initiatives

**Instructions:** Describe the Proposer-Led Team’s current environmental policies and practices and any related initiatives proposed to be used in the completion of the tasks described in Appendix A (Scope of Work).

<Response>

# Section H. Terms and Conditions in the Sample Contract: Acceptance of/or Exceptions to

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| **It is the duty of every Proposer to thoroughly review the Sample Contract (Appendix C) to ensure compliance with all terms, conditions and requirements. In submitting a Proposal, the Proposer agrees to accept, as stated, the County’s terms and conditions in the Sample Contract. However, the Proposer is provided the opportunity to take exception to the County’s terms, conditions and requirements.**  **Instructions: Provide a statement offering the Proposer’s acceptance of or exceptions to all terms and conditions listed in the Appendix C (Sample Contract).**  **Indicate all exceptions to the Sample Contract by providing a ”red-lined” version of the language in question as an Attachment to the Technical Proposal. For each exception, the Proposer shall provide:**   * An explanation of the reason(s) for the exception; * The proposed alternative language;and * A description of the impact, if any, to the Proposer’s price in the Cost Proposal. Note: No detailed cost information shall be included in the Technical Proposal. Any relevant costs must be included in the Cost Assumptions tab in the Cost Proposal Response Template.   **Specify in this Response Template the location of the attachment.** |

<Response>

# Section I. General Assumptions

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| **Instructions:** Document any assumptions made in preparing a response to the Technical Proposal, not including assumptions documented in the response to the Scope of Work under Section C, in the following Table. Add rows as necessary. Do not include any assumptions related to costs. Do not change any of the pre-populated sections. Any changes to the pre-populated sections could lead to the disqualification of the Proposal. |

1. General Assumptions to the Technical Proposal

| **ITEM #** | **REFERENCE (SECTION, PAGE)** | **DESCRIPTION** | **RATIONALE** |
| --- | --- | --- | --- |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |