

**CALIFORNIA COUNTY ASSESSOR'S INFORMATION TECHNOLOGY AUTHORITY**

**Technology Services  
California Multiple Award Schedule (CMAS) Agreement for  
Project Manager Services**

**REQUEST FOR OFFER # 2023-1**

**OFFER DUE DATE**

**September 18, 2023 by 4:00 PM PST**

Rob Grossglauer  
Interim Executive Director  
California County Assessors' Information Technology Authority  
[Rob.Grossglauer@CCAITJPA.ORG](mailto:Rob.Grossglauer@CCAITJPA.ORG)

**September 8, 2023**

## REQUEST FOR OFFER

You are invited to review and respond to the California County Assessor's Information Technology Authority ("Authority"), Request for Offer (RFO), entitled Program Management Consulting Services. Read this document carefully. In submitting your Offer, you must comply with the instructions, terms and conditions stated in this RFO and in your CMAS contract.

Your Offer must be received in the office of Authority via email no later than **September 18, 2023, by 4:00 PM** Pacific Time (PT). Offers received after the specified date and time may be rejected.

Any attempt by a firm responding to this Offer to initiate contact with any member of the Authority and/or Authority staff, other than the Authority contact listed above, regarding this RFO process may disqualify the firm from further consideration.

Please note that no *verbal* information given will be binding upon the Authority unless such information is incorporated into this RFO via an addendum.

**TABLE OF CONTENTS**

- 1. INTRODUCTION**
- 2. QUALIFICATIONS REQUIREMENTS**
- 3. OFFER REQUIREMENTS AND INFORMATION**
- 4. ATTACHMENTS**
  1. Information and Offer Sheet
  2. Proposed Project Person Skill Summary Sheet
  3. Proposed Project Person Business Reference Sheet
  4. Cost Sheet

# **CALIFORNIA COUNTY ASSESSOR'S INFORMATION TECHNOLOGY AUTHORITY**

## **REQUEST FOR OFFER**

With this Request for Offer (“RFO”), California County Assessor’s Information Technology Authority (“Authority”) is requesting proposals (“Proposals”) from qualified individuals and/or firms (“Respondents”) for the following services:

### ***Project Manager Services***

The purpose of the Proposal is to demonstrate the qualifications, competence, and capacity of Respondent to perform the work or provide the services described in this RFO.

## **1. INTRODUCTION**

### **1.1 About the Authority**

The Authority was created in November 2022 as a joint powers authority organized under Government Code section 6500, et seq. for the purposes of implementing a new information technology program for California County Assessors to assist in the standardization of statewide assessment practices. The program receives state funding as set forth in Revenue and Taxation Code section 95.60.

The passage of Proposition 19 created new requirements for filing documents, certifying values across Counties, and reporting to the State. California Assessors have expended hundreds of hours developing procedures to efficiently process applications for base year value transfers. As a result, we have concluded that we need a clearinghouse, or portal, that will provide easy access for taxpayers to obtain and file the required forms, as well as easy access for County Assessors' staff to communicate with one another about the information needed to process an application between Counties. Additionally, the portal will be used to develop reports for State Agencies such as the Board of Equalization and the California Department of Tax and Fee Administration. This project aims to streamline the required activities and mitigate some of the operational costs associated with its implementation.

After the implementation of the identified information technology solutions, the Authority may administer and maintain the program going forward.

Authority’s office is located at 1221 Oak St Ste 145, Oakland, CA 94612 and its e-mail address for the purpose of this RFO is [Rob.Grossglauser@CCAITJPA.ORG](mailto:Rob.Grossglauser@CCAITJPA.ORG) Interested respondents can obtain information about the Authority at the following website: <https://ccaitjpa.org> where this RFO will be posted under Procurement.

### **1.2 Description of Services**

The Authority desires proposals from Respondents who will, as an independent contractor, provide services as the Agency’s Project Manager consistent with the Scope of Services attached hereto as **Attachment 1** (“Scope”); Certificate of Proposal attached to this RFO as **Attachment 2 (Certificate)** (collectively, “Services”). The Authority reserves the right, at any time up to selection, to amend, augment or revise the Services.

The Authority expects that the Services will include a term of one (1) year, with two (2) additional one (1) year renewal options, exercised at the Authority’s sole discretion.

## 2. QUALIFICATIONS REQUIREMENTS

Proposals must meet all of the following minimum qualifications to Authority's satisfaction to be given further consideration. Failure to satisfy any of the minimum qualifications upon submittal of the Offer may result in the immediate rejection of any Offer.

### Minimum Administrative Qualifications

#### As of the Offer Due Date:

- 2.1 The Respondent must hold a current Information Technology California Multiple Award Schedule (CMAS) agreement with the California Department of General Services and must comply with the instructions, terms and conditions stated in the CMAS contract.
- 2.2 The Respondent must submit all data, information, and attachments requested in the offer format described below under Section D, Subsection 2, Offer Requirements. **Failure to submit Attachment I - Information and Offer Sheet and Attachment II - Proposed Project Person Skill Summary Sheet, by the Offer Due Date, will be grounds for immediate rejection of the submission.**

### Minimum Qualifications for the Respondent's Proposed Personnel

To be eligible to have a Proposal considered, the Respondent **must submit three (3) project persons, candidates**, for the Authority's consideration. Stronger candidates will be able to meet both the required and preferred qualifications. In order for a candidate to be considered, the individual must satisfy any/all required qualifications:

1. Ten (10) years of experience in project management capacity managing software development lifecycles and/or software vendor implementations for projects whose aggregate budget was at least \$10 million dollars; **preferred**.
2. Ten (10) years of experience in project management capacity designing, developing, and/or implementing software solutions for projects whose aggregate budget was at least \$10 million dollars; **preferred**.
3. Experience in software vendor qualification, selection, negotiation, and performance management responsibilities for projects whose aggregate budget was at least \$3 million dollars; **required**.
4. Experience in software implementation projects for County Assessor operations within the State of California; **highly desired**.
5. Bachelor's degree required, and master's degree; **preferred**.
6. Project Management Professional (PMP) certification; **preferred**.

## 3. OFFER REQUIREMENTS AND INFORMATION

### 3.1 Time Schedule

Authority will use its best efforts to adhere to the time schedule. However, Authority reserves the right to amend the time schedule, as it deems necessary or appropriate.

<b>Event</b>	<b>Date</b>
Offer Due Date	<b>September 18, 2023 by 4:00 PM PT</b>
Estimated Start Work Date	<b>October 2, 2023</b>

### 3.2 **Offer Requirements**

To be eligible, an Offer must include all of the following listed attachments:

- (a) **Attachment I, Information and Offer Sheet**
- (b) **Attachment II, Proposed Project Person Skill Summary Sheet**
- (c) **Attachment III, Proposed Project Person Business Reference Sheet**

One (1) Business Reference Sheet must be completed for each proposed project person. Business references should be able to verify the proposed project person's experiences, within the last 10 years, and to verify the other information provided regarding such person.

- (d) **Attachment IV, Cost Sheet**
- (e) **Copy of each proposed project personnel's resume**
- (f) **Current California Multiple Award Schedule (CMAS) Agreement**

One (1) copy of the Respondent's current, completed and signed CMAS agreement and all supplements issued by the Department of General Services.

### 3.3 **Submission of Offer**

- (a) The Offer must be submitted via email to [Rob.Grossglauser@CCAITJPA.org](mailto:Rob.Grossglauser@CCAITJPA.org) and received no later than the Offer Due Date and time specified on the cover page of this RFO. Late and incomplete Offers may be rejected.
- (b) It is the Respondent's responsibility to respond with all data/information requested; provide data/information that is deemed adequate for Authority to determine/verify the proposed project person's ability to perform the tasks/activities defined in Exhibit A, Statement of Work; and submit all data/information in the Offer format described in Section D, Subsection 2, Offer Requirements.
- (c) By submittal of an Offer, the Respondent declares that any proposed project person is in compliance with all experience, qualification, and education requirements stipulated in the CMAS and GSA agreements.

- (d) This RFO and all Offers in response to this RFO will be made a part of the resulting contract file. All documents submitted in response to this RFO will become the property of Authority and may be subject to review by or release to the public under the California Public Records Act, Government Code 6250 et seq.
- (e) Authority accepts no responsibility for any technical difficulties associated with the electronic submission and transmission of any Offer.
- (f) Costs for developing Offers and in anticipation of award of an agreement are entirely the responsibilities of the Respondents and shall not be charged to Authority.
- (g) Respondents may modify their Offer, after its submission, by withdrawing their original Offer and resubmitting a new Offer prior to the Offer Due Date. Offer modifications submitted in any other manner, oral or written, or after the Offer Due Date will not be considered. Respondents may withdraw their own Offer by submitting a written withdrawal request to the Authority Contact via email at [Rob.Grossglauser@CCAITJPA.org](mailto:Rob.Grossglauser@CCAITJPA.org). Respondents may thereafter submit a new Offer prior to the Offer Due Date.
- (h) Authority reserves the right to cancel this RFO at any time and has the right to reject all Offers. Authority is not required to award an agreement.

### 3.4 Comparison Process

- (a) Offers and any subsequent presentations should be submitted with the most favorable terms the Respondent can offer.
- (b) If Authority is unable to execute an agreement with the most qualified and responsible Respondent, Authority reserves the right to award the agreement to the next qualified and responsible Respondent.
- (c) Offers will be reviewed to determine best value using the following phases:

<b>PHASES</b>		
<b>1</b>	SATISFACTION OF MINIMUM ADMINISTRATIVE AND TECHNICAL QUALIFICATIONS	Pass/Fail
<b>2</b>	TECHNICAL QUALIFICATION REVIEW	70 points
<b>3</b>	COST COMPARISON	30 points
<b>PHASE 1 Pass + PHASE 2 + PHASE 3 SCORE</b>		<b>100 points</b>
<b>4</b>	INTERVIEWS	100 points
	REFERENCE CHECKS (OPTIONAL)	Pass/Fail
<b>5</b>	NEGOTIATIONS	Pass/Fail

- (i) In Phase 1, the Respondent's offer will be reviewed for the minimum administrative qualifications and the Respondent's proposed personnel will be reviewed for the minimum qualifications. Both the minimum administrative and personnel qualifications must be met to Authority's satisfaction to be given further consideration. Failure to satisfy any of the minimum qualifications may result in the immediate disqualification of the offer and/or applicable proposed personnel.
- (ii) Offers meeting the minimum qualifications will move to Phase 2, Qualification Review. The Proposed Project Personnel's expertise, experience, and education will be reviewed and scored based on the information provided in their Attachment II, Skill Summary Sheet, and resume.
- (iii) In Phase 3, Cost Comparison, the cost total, as calculated by a blended hourly rate, will be calculated for each of the three Proposed Personnel provided in the Respondent's Attachment IV, Cost Sheet, will be scored using the cost formula indicated below. The Offer with the lowest cost total will receive the full allotment of points. All other Offers will be scored as follows:

$$\frac{\text{Lowest Cost Total} \times \text{Maximum Number of Points (30)}}{\text{Respondent's Proposed Cost Total}} = \text{Respondent's Score}$$

- (iv) In Phase 4, a Respondent candidate after Phase 2, Personnel Qualification Review and Phase 3, Cost Comparison may be invited for one or more rounds of interviews. Reference checks may be conducted.
- (v) In Phase 5, Authority will negotiate rates for a proposed personnel candidate if necessary with the highest ranking Respondent from Phase 4. No new personnel may be proposed or negotiated after the final offer due date. If the initial highest ranking Respondent is no longer available and/or does not pass Phase 5, Negotiations, Authority reserves the right to move to the next highest ranking Respondent from Phase 4.

### 3.5 Award

- (a) If Authority enters into an agreement, it will be with the highest scoring responsive and responsive Respondent, as detailed above, subject to optional reference checks including passing the negotiations phase, and satisfying all the requirements for this RFO. Respondents should review the attached Purchasing Authority Purchase Order Agreement for a sample of the agreement that will be awarded.
- (b) If Authority is unable to execute an agreement with the highest scoring Respondent, Authority reserves the right to award to the next highest scoring responsive Respondent in line.
- (c) If at any time during or at the conclusion of this RFO process Authority determines that, in its opinion, the results of this process are unsatisfactory, Authority reserves the right to cancel this RFO, discontinue this process and decline to award an agreement.
- (d) In the event of a tie, (i.e. two Respondent with the same highest score), the award shall be determined by a coin toss.



### **3.6 Payment Structure**

The payment structure for activities performed under Exhibit A, Statement of Work, is hourly.

Invoices shall be submitted in triplicate not more frequently than monthly in arrears.

Invoice(s) must include: 1) Purchase Order Number, 2) Contractor's name, address and telephone number, 3) total amount of invoice, 4) copies of the Contractor's weekly status reports that cover the invoice dates, and 5) a copy of the timesheet approved/signed by the Authority Executive Director that covers the invoice dates.

### **3.7 Services or Procurement Resulting from Agreement**

No person, firm, or subsidiary thereof awarded an agreement resulting from this RFO may submit a bid for, nor be awarded a contract for, the provision of services, procurement of goods or supplies, or any other related action which is required, suggested, or otherwise deemed appropriate in the end product of an agreement resulting from this RFO. (Public Contract Code §10365.5).

### **3.8 Workers' Compensation/Employer's Liability Insurance**

Contractor shall maintain statutory workers' compensation and employer's liability coverage for all its employees who will be engaged in the performance of the agreement, including special coverage extensions where applicable.

### **3.9 Security**

Contractor shall perform a background investigation on all of Contractor's employees, subcontractors and agents assigned to perform the services, or any part of the services, pursuant to the agreement (the "Contractor Personnel"), per the provisions of the attached Sample Purchasing Authority Purchase Order Agreement, Section G - Affirmative Covenants, Item 10 – Security, and must demonstrate compliance with Exhibit E, Authority Contractor Background Investigation Policy. Authority reserves the right to conduct a background investigation on the contractor's personnel, at its sole discretion.

**ATTACHMENT I**

**Information and Offer Sheet**

<b>Firm</b>	
<b>Firm Name</b>	
<b>Street Address</b>	
<b>City, State, Zip Code</b>	
<b>CMAS &amp; Small Business / DVBE Certification</b>	
<b>CMAS Number</b>	
<b>CMAS Term Dates</b>	
<b>Certified Small Business Enterprise (Yes or No) If Yes, provide DGS certification number.</b>	
<b>Certified Disabled Veteran Business Enterprise (Yes or No) If Yes, provide DGS certification number.</b>	
<b>Administrative Contact</b>	
<b>Name</b>	
<b>Title</b>	
<b>Office Telephone # (Include area code)</b>	
<b>Cell Telephone # (Include area code)</b>	
<b>Email Address</b>	
<b>Authorized Signer</b>	
<b>Name</b>	
<b>Title</b>	
<b>Office Telephone # (Include area code)</b>	
<b>Cell Telephone # (Include area code)</b>	
<b>Email Address</b>	

Respondent shall include in their offer at least three (3) and no more than five (5) proposed candidate project persons. that will appropriately satisfy all of the work outlined in the RFO document and in Exhibit A, Statement of Work.

	<b>Proposed Project Person #1 (Mandatory)</b>
<b>Name of Proposed Project Person</b>	
<b>Role Title</b> <small>[Identify the role title if it is different than the CMAS (GSA) Classification]</small>	
<b>CMAS (GSA) Classification</b> <small>(Must be a job title listed in the base GSA that are within the scope of your CMAS as listed in the Available Products and/or Services)</small>	
<b>CMAS (GSA) Hourly Rate</b>	\$ /hr
<b>Discount Hourly Rate Offered</b> <small>(rate to be used for calculation on Attachment IV, Cost Sheet)</small>	\$ /hr

	<b>Proposed Project Person #2 (Mandatory)</b>	<b>Proposed Project Person #3 (Optional)</b>
<b>Name of Proposed Project Person</b>		
<b>Role Title</b> <small>[identify the role title if it is different than the CMAS (GSA) Classification]</small>		
<b>CMAS (GSA) Classification</b> <small>(Must be a job title listed in the base GSA that are within the scope of your CMAS as listed in the Available Products and/or Services)</small>		
<b>CMAS (GSA) Hourly Rate</b>	\$ /hr	\$ /hr
<b>Discount Hourly Rate Offered</b> <small>(rate to be used for calculation on Attachment IV, Cost Sheet)</small>	\$ /hr	\$ /hr

	<b>Proposed Project Person #4 (Optional)</b>	<b>Proposed Project Person #5 (Optional)</b>
<b>Name of Proposed Project Person</b>		
<b>Role Title</b> <small>[identify the role title if it is different than the CMAS (GSA) Classification]</small>		
<b>CMAS (GSA) Classification</b> <small>(Must be a job title listed in the base GSA that are within the scope of your CMAS as listed in the Available Products and/or Services)</small>		
<b>CMAS (GSA) Hourly Rate</b>	\$ /hr	\$ /hr
<b>Discount Hourly Rate Offered</b> <small>(rate to be used for calculation on Attachment IV, Cost Sheet)</small>	\$ /hr	\$ /hr

**ATTACHMENT II**

**Proposed Project Person Skill Summary Sheet**

**One (1) Skill Summary Sheet must be completed for each Proposed Project Person.**

<b>Firm Name</b>	
<b>Proposed Project Person Name</b>	
<b>Role/Title</b>	

**As of the Offer Due Date, the Proposed Project Person must individually or collectively\* meet the following REQUIRED QUALIFICATIONS and also articulate to Authority' satisfaction the PREFERRED QUALIFICATIONS to be given further consideration. Failure to satisfy any of the minimum qualifications may result in the immediate rejection of the offer.**

**Follow the format prescribed below.** The work experiences, skills and abilities listed in each description must be verifiable by proposed person references and resumes. A statement such as, *Refer to Resume*, is not acceptable. All fields must be completed.

**TECHNICAL QUALIFICATIONS**

1. Ten (10 years) of experience in project management capacity managing software development lifecycles and/or software vendor implementations for projects whose aggregate budget was at least \$10 million dollars; PREFERRED.	<b>YES / NO</b>	<b>TOTAL NO. OF YEARS</b>
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**Do you meet the above qualification?**

Provide a **detailed** description of specific work experience that meets the qualification.

**Description**

Work Location(s)	Date Ranges(s)		No. of Years
	From (MM/YYYY)	To (MM/YYYY)	

2. Ten (10) years of experience in project management capacity designing, developing, and/or implementing software solutions for projects whose aggregate budget was at least \$10 million dollars; PREFERFED.	<b>YES / NO</b>	<b>TOTAL NO. OF YEARS</b>
<b>Do you meet the above qualification?</b>		

Provide a **detailed** description of specific work experience that meets the qualification.

**Description**

Work Location(s)	Date Ranges(s)		No. of Years
	From (MM/YYYY)	To (MM/YYYY)	

3. Experience in software vendor qualification, selection, negotiation, and performance management responsibilities for projects whose aggregate budget was at least \$3 million dollars; <b>REQUIRED</b> .	<b>YES / NO</b>	<b>TOTAL NO. OF YEARS</b>
<b>Do you meet the above minimum qualification?</b>		

Provide a **detailed** description of specific work experience that meets the minimum qualification.

**Description**

Work Location(s)	Date Ranges(s)		No. of Years
	From (MM/YYYY)	To (MM/YYYY)	

For each **DESIRABLE QUALIFICATION**, give a brief description of specific work experience that meets/exceeds the criteria and demonstrates the number of **YEARS** entered, as applicable.

**Follow the format prescribed below.** The work experiences, skills and abilities listed in each description must be verifiable by proposed person references and resumes. A statement such as, *Refer to Resume*, is not acceptable. Upon Authority request, a copy of the degrees/certifications for desirable technical qualifications, 3-8 may be requested during Phase 4, Interviews.

<b>DESIRABLE QUALIFICATIONS</b>	<b>YEARS</b>
1. Experience in software implementation projects for County Assessor operations within the State of California.  <u>Description</u>	
2. Project Management Professional (PMP) certification  <u>Description</u>	
3. Bachelor's degree required, and master's degree from an accredited college or university.  <u>Description</u>	

**ATTACHMENT III**

**Proposed Project Person Business Reference Sheet**

**One (1) Business Reference sheet must be completed for each Proposed Project Person.**

Business references should be able to verify the proposed project person’s experiences, within the last 10 years, and to verify the other information provided regarding such person, minimum of one (1) reference.

<b>Firm Name</b>	
<b>Proposed Project Person Name</b>	

<b>Reference 1</b>	
<b>Name of Company/Agency</b>	
<b>Company/Agency City, State</b>	
<b>Contact Person</b> (Name and Title)	
<b>Contact Telephone #</b> (Include area code)	
<b>Contact Email Address</b>	
<b>Dates of Service</b> (Include years and months)	

<b>Reference 2</b>	
<b>Name of Company/Agency</b>	
<b>Company/Agency City, State</b>	
<b>Contact Person</b> (Name and Title)	
<b>Contact Telephone #</b> (Include area code)	
<b>Contact Email Address</b>	
<b>Dates of Service</b> (Include years and months)	

<b>Reference 3</b>	
<b>Name of Company/Agency</b>	
<b>Company/Agency City, State</b>	
<b>Contact Person</b> (Name and Title)	
<b>Contact Telephone #</b> (Include area code)	
<b>Contact Email Address</b>	
<b>Dates of Service</b> (Include years and months)	

## ATTACHMENT IV

### Cost Sheet

Respondents must submit their proposed rates in the format prescribed below. The proposed rates (in US dollars) shall include all costs and expenses, including travel expenses, that may incur and are necessary to provide the services to Authority as described in this RFO. Unit Prices shall not exceed two (2) decimal places. The hourly rates, subject to negotiations, as submitted shall be for the term of the agreement including any extensions.

Upon completion of any services provided by Contractor and accepted by Authority, at the end of each billing period, services shall be billed in accordance with the proposed hourly rates in this Cost Sheet, subject to negotiations prior to contract award.

Authority reserves the right to add time and monies over the contract period at Authority' discretion.

<b><i>EXAMPLE of Completed Cost Table</i></b>	
<b>Proposed Project Person Name</b> (as listed on Attachment 1)	<b>Proposed Discounted Hourly Rate</b> (as listed on Attachment 1)
<i>Person #1 Name</i>	<i>\$98.00</i>
<i>Person #2 Name</i>	<i>\$105.00</i>
<b><i>Cost Total (Blended/Average Hourly Rate)</i></b>	<b><i>\$101.50</i></b>

#### A. Proposed Total Cost

<b>Proposed Project Person Name</b> (as listed on Attachment 1)	<b>Proposed Discounted Hourly Rate</b> (as listed on Attachment 1)
<b><i>Cost Total (Blended/Average Hourly Rate)</i></b>	

The Cost Total will be the amount used in Phase 3, Cost Comparison.