

COUNTY OF LOS ANGELES
ENTERPRISE SERVICES MASTER AGREEMENT (ESMA)
REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)
RFSQ # ITS-I10604-S



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PREPARED BY: LOS ANGELES COUNTY INTERNAL SERVICES DEPARTMENT

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1.0 GENERAL INFORMATION

1.1 Purpose and Background:

The County of Los Angeles' (County) Internal Services Department (ISD or Department) is seeking qualified companies to enter into master agreements with the County to provide technical consulting services in support of information technology (IT) initiatives and implementation of County IT standards.

1.2 Scope of Work:

Vendors interested in becoming a Qualified Contractor in one or more of the Service Categories set forth in Appendix B ([ESMA Service Categories](#)) are encouraged to submit a Statement of Qualifications (SOQ) in response to this Request for Statement of Qualifications (RFSQ). Each Vendor (Vendor) demonstrating that it meets the requisite requirements for one or more of the Service Categories set forth in Appendix B, that accepts the Enterprise Services Master Agreement (ESMA) without exceptions, and that meets the insurance requirements set forth in Appendix D ([Sample Master Agreement](#)) will be awarded a ESMA and become a Qualified Contractor.

Under the ESMA, each Qualified Contractor will be included, depending on demonstrated qualifications, in one or more Service Categories that describe specific IT experience and requirements. As County work requirements arise during the term of the ESMA, Qualified Contractors in the applicable Service Categories will be solicited for bids or proposals to perform work under a Work Order (WO). The only compensation made to Qualified Contractors under the ESMA will be through satisfactory work performed under a duly issued and executed WO, in accordance with applicable County procedures.

Some significant features of this RFSQ and the resulting ESMA are as follows:

1. The terms contained in the ESMA are non-negotiable. The ESMA will be uniformly executed by all Qualified Contractors.
2. The ESMA may be amended, from time to time during the term of the ESMA, to accommodate changes in County contracting policies and procedures.
3. The ESMA will be used to expeditiously obtain key IT support services needed by various County departments.
4. Work pursuant to the ESMA will be solicited via Work Order Solicitations (WOS) and will be solicited for projects to be performed on a Fixed Price Per Deliverable (FP/D) or Time and Material Per Deliverable (T&M/D) basis as specified in each WOS. **Staff augmentation for general IT support may not be solicited via the ESMA.**
5. **No hourly rates for labor or fixed prices for services and/or deliverables are required from Vendors at this time.** Hourly rates and/or fixed prices will be required when Qualified Contractors respond to WOSs.
6. During the term of the ESMA, newly Qualified Vendors may be added at any time to the list of Qualified Contractors for each Service Category.
7. During the term of the ESMA, Service Categories may be added or deleted at any time, based on the County's needs and at the County's sole discretion.

8. Qualified Contractors wishing to expand the number of Service Categories for which they are eligible may also apply at any time to be added to the lists of Qualified Contractors for new Service Categories.
9. WOSs will be sent electronically to Qualified Contractors in the respective Service Categories and responses to the WOS must be submitted electronically, unless otherwise stated in the WOS.

1.3 Overview of Solicitation Document:

This RFSQ is comprised of the following Paragraphs/Parts:

- ▶ **1.0 [GENERAL INFORMATION](#):** Specifies the minimum qualifications, provides information regarding some of the requirements of the ESMA and the WOS process.
- ▶ **2.0 [INSTRUCTION TO VENDORS](#):** Contains instructions to Vendors regarding how to prepare and submit their SOQ in response to this RFSQ.
- ▶ **3.0 [SOQ REVIEW, SELECTION, AND QUALIFICATION PROCESS](#):** Explains how the SOQ will be reviewed and how Vendors will be selected and qualified for particular Service Categories.
- ▶ **[ESMA RFSQ APPENDICES](#):** Appendices included in the RFSQ.

1.4 Terms and Definitions:

Throughout this RFSQ, references are made to certain persons, groups, or departments/agencies. Where not defined herein, such terms will be as defined in Paragraph 2.0 (Definitions) of Appendix D ([Sample Master Agreement](#)).

1.5 Vendor's Minimum Qualifications:

Interested and Qualified Vendors that meet the Minimum Qualifications for specific Service Categories set forth in Appendix B ([ESMA Service Categories](#)) and as further outlined below are invited to submit a SOQ.

- 1.5.1 Appendix B defines the type of service, specific Minimum Qualifications, the requisite number of engagements, and the years of experience required for each Service Category. These Minimum Qualifications are solely for the purpose of qualifying for, and being accepted as, a Qualified Contractor under the terms of this RFSQ. For each WOS subsequently posted under the ESMA, County may provide additional minimum qualifications and other specific requirements as applicable to the services required under the Statement of Work (SOW) for which a WO is being solicited.
- 1.5.2 If Vendor's compliance with a County contract has been reviewed by the Department of the Auditor-Controller within the last ten (10) years, Vendor must not have unresolved questioned costs identified by the Auditor-Controller, in an amount over \$100,000.00, that are confirmed to be disallowed costs by the contracting County department, and remain unpaid for six (6) months or more from the date of disallowance, unless such disallowed costs are the subject of current good faith negotiations to resolve the disallowed costs, in the opinion of the County.

1.6 Acceptance of Terms and Conditions of ESMA:

Vendors understand and agree that the submission of a SOQ constitutes Vendor's acknowledgement and acceptance of all terms and conditions (as it may be updated from time to time) of the ESMA, if qualified and awarded a resultant ESMA.

1.7 ESMA Process:

Project specifications, tasks, deliverables, etc. will be determined at the time ISD issues a WOS similar to Appendix C ([Sample Work Order Solicitation](#)) and in accordance with Paragraph 3.0 (Work) of Appendix D ([Sample Master Agreement](#)).

- 1.7.1 An ESMA will be executed with all Vendors determined to be qualified for a particular Service Category(ies).
- 1.7.2 Upon ISD's execution of the ESMA's, the Qualified Vendors will become Qualified Contractors, and thereafter be solicited under competitive conditions in the form of a WOS similar to Appendix C for either Fixed Price Per Deliverable or Time and Material Per Deliverable basis bids to provide as needed IT consulting services in accordance with Paragraph 3.0 of Appendix D.
- 1.7.3 WOs resulting from successfully solicited WOSs will include a SOW which will describe in detail the particular project and the work required for the performance thereof.
- 1.7.4 Payment for all work must be either on a Fixed Price Per Deliverable (FP/D) basis or Time and Material Per Deliverable (T&M/D) basis, subject to the Total Maximum Amount specified on each individual WO.
- 1.7.5 The execution of an ESMA does not guarantee a Qualified Contractor any minimum amount of work or business.
- 1.7.6 The ESMA includes various Service Categories as described in Appendix B ([ESMA Service Categories](#)). Only those Contractors qualified in the specific Service Category being solicited will be contacted to submit bids during a WOS process.

1.8 ESMA Term:

In accordance with Paragraph 10.0 (Term of Master Agreement) of Appendix D (Sample Master Agreement), the term of the ESMA will go into effect upon the date of execution by the Director, Internal Services Department (Director, ISD), or his designee, as authorized by the Board of Supervisors (Board), and will expire five (5) years from Master Agreement execution ("ESMA Expiration Date"), unless sooner terminated, in whole or in part, as provided in the ESMA.

- 1.8.1 The term of the ESMA will be subject to two (2) additional two-year option period and six (6) one-month option periods, for a total a potential total term expiring nine (9) years and six (6) months from ESMA Expiration Date.
- 1.8.2 Option periods will be exercised at the sole discretion of the Director, ISD, as authorized by the Board.

County will continuously accept SOQs throughout the duration of the ESMA to qualify Vendors for all Service Categories. In these instances, the ESMA will go into effect upon the date of execution by the Director, ISD, or his designee, as authorized by the Board, and will

expire on the ESMA Expiration Date, unless sooner extended or terminated, in whole or in part, as provided in the ESMA, in accordance with Paragraph 10.0 of Appendix D.

1.9 WOS and Award Process:

The comprehensive WOS, evaluation and award processes are set forth in Paragraph 4.0 (Work Order Solicitation Process) and Paragraph 5.0 (Work Order Evaluation and Award Process) of Appendix D ([Sample Master Agreement](#)). This Section 1.9, briefly outlines the process. All interested Vendors are required to read Appendix D in its entirety, paying particular attention to Paragraph 4.0 and Paragraph 5.0 of Appendix D to thoroughly understand the process.

1.9.1 **Work Order Solicitations:** The specific criteria and qualifications required to qualify a Vendor for the ESMA are described in Appendix B ([ESMA Service Categories](#)) and Appendix D (Sample Master Agreement). WOSs, similar in form to Appendix C ([Sample Work Order Solicitation](#)), will contain the specific service descriptions and qualifications that are required to award a WO to a Qualified Contractor.

Bids and proposals in response to WOSs will generally include the following:

- Submission of WO Proposal by the Bid Submission Deadline set forth in the WOS;
- Fixed Price Per Deliverable (FP/D) or Hourly Rate and Estimated Hours per Deliverable (for Time and Material Per Deliverable (T&M/D)) for work requested;
- Proof of each Contractor Personnel or Consultant as defined in Appendix D, being proposed by the Qualified Contractor meeting the Minimum Qualifications of this RFSQ;
- Proof of meeting any other requirements or qualifying information specified in the WOS.

The WO Proposal will be evaluated by the County based on the requirements in the WOS and in accordance with the evaluation methodology set forth in the WOS and Paragraph 4.0 and Paragraph 5.0 of Appendix D. The evaluation may include proposed Contractor verification of reference(s) and/or a background security investigation of proposed Contractor Personnel in accordance with Section 14.6 (Background and Security Investigations) of Appendix D. Proposed Contractor, if determined qualified by the County, may be interviewed and/or requested to provide a demonstration as a component part of the evaluation process.

Successfully submitted WO Proposals meeting all of the minimum qualifications, if any, and evaluated in accordance with the WOS will be awarded a WO in accordance with Paragraph 5.0 (Work Order Evaluation and Award Process) of Appendix D.

1.9.2 **Project Management:** In each resultant WO executed, the County will identify a County WO Project Manager responsible for the success of the WO engagement. Qualified Contractors will have identified, in Exhibit D ([Contractor's Administration](#)) of Appendix D (Sample Master Agreement), the Project Manager who will generally be responsible for the satisfactory performance of all of the Qualified Contractor's executed WOs. The County's WO Project Manager will, at his/her discretion, inspect any and all of the Qualified Contractor's work in progress at any time to verify progress, quality, and conformance with design specifications.

1.10 County's Rights and Responsibilities:

The County has the right to cancel or amend the RFSQ by written addendum at any time. The County is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda thereto. Each addendum will be made available to each organization which County records indicate have received this RFSQ. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the SOQ not being considered and returned to the Vendor for completion, as determined in the sole discretion of the County. The County is not responsible for and will not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.

1.11 Contact with County Personnel:

Any contact regarding this RFSQ or any matter relating thereto must be in writing and e-mailed to:

ESMA Administrator

Email: esmaadmin@isd.lacounty.gov

If it is discovered that a Vendor contacted and received information from any County personnel, other than the person specified above, regarding this RFSQ, the County, in its sole discretion, may disqualify their SOQ from further consideration.

1.12 Mandatory Requirements to Register on County's WebVen:

Prior to executing an ESMA, all potential Contractors **must register** in the County's WebVen. The WebVen contains the Vendor's business profile and identifies the goods/services the business provides. Registration can be accomplished online via the Internet by accessing the County's home page at: <http://camisvr.co.la.ca.us/webven/>.

1.13 County Option to Reject SOQs:

The County may, in its sole discretion, reject any or all SOQs submitted in response to this RFSQ. The County will not be liable for any cost incurred by a Vendor in connection with preparation and submittal of any SOQ. The County reserves the right to waive, in its sole discretion, inconsequential disparities in a submitted SOQ.

1.14 Protest Policy Review Process:

- 1.14.1 Under Board Policy No. [5.055 \(Services Contract Solicitation Protest\)](#), any prospective Vendor may request a review of the requirements under a solicitation for a Board-approved services contract, as described in Section 1.14.3 below. Additionally, any actual Vendor may request a review of a disqualification under such a solicitation, as described in the Sections below.
- 1.14.2 Throughout the review process the County has no obligation to delay or otherwise postpone an award of contract based on a Vendor protest. In all cases, the County reserves the right to make an award when it is determined to be in the best interest of the County to do so.
- 1.14.3 **Grounds for Review:** Unless State or Federal statutes or regulations otherwise provide, the grounds for review of any ISD determination or action should be limited to the following:
 - ▶ [Section 2.4:](#) Solicitation Requirements Review in this RFSQ; and
 - ▶ [Section 3.2:](#) Disqualification Review.

1.15 Notice to Vendor's Regarding Public Records Act:

- 1.15.1 Responses to this RFSQ will become the exclusive property of the County. At such time as when ISD recommends the Qualified Vendor(s) to the Board and such recommendation appears on the Board agenda, all SOQs submitted in response to this RFSQ become a matter of public record with the exception of those parts of each SOQ which are justifiably defined and identified by the Vendor as business or trade secrets, and plainly marked as "Trade Secret," "Confidential," or "Proprietary."
- 1.15.2 The County will not in any way be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law.

A blanket statement of confidentiality or the marking of each page of the SOQ as confidential will not be deemed sufficient notice of exception. The Vendor must specifically label only those provisions of their respective SOQ which are "Trade Secrets," "Confidential," or "Proprietary" in nature.

1.16 Indemnification and Insurance:

Vendor must comply with the Indemnification provisions contained in Paragraph 39.0 (Intellectual Property Indemnification) and Paragraph 40.0 (Contractor Acts And/Or Omissions Indemnification) of Appendix D ([Sample Master Agreement](#)) and any other indemnification obligations set forth therein. Vendor must procure, maintain, and provide to the County proof of insurance coverage for all the programs of insurance along with associated amounts specified in Paragraph 42.0 (General Provisions for all Insurance Coverage) and Paragraph 43.0 (Insurance Coverage) of Appendix D.

1.17 Background and Security:

At the discretion and request of County, Contractor Personnel performing work under any WO may be required to undergo and pass to the satisfaction of the County, a background and security investigation in accordance with Section 14.6 (Background and Security Investigations) of Appendix D (Sample Master Agreement), as a condition of beginning and continuing work under a WO. The County may request that such investigation(s) be conducted periodically during the term of any WO. **All Contractor Personnel requiring access to Court facilities will undergo additional background and security investigation(s) as set forth in the applicable WO.**

1.18 Confidentiality and Independent Contractor Status:

Prospective Vendors must comply with the confidentiality provision Section 14.7 (Confidentiality and Security), and the independent contractor status provision, Paragraph 38.0 (Independent Contractor Status) of Appendix D (Sample Master Agreement).

1.19 Conflict of Interest:

No County employee whose position in the County enables him/her to influence the selection of a Contractor for this RFSQ, or any competing RFSQ, nor any spouse of economic dependent of such employees, must be employed in any capacity by a Vendor or have any other direct or indirect financial interest in the selection of a Contractor. Vendor must certify that he/she is aware of and has read [Section 2.180.010 of the Los Angeles County Code](#) as stated in SOQ Form 3 ([Certification of Compliance](#)) of Appendix A ([Required SOQ Forms](#)).

1.20 Determination of Vendor Responsibility:

- 1.20.1 A responsible Vendor is a Vendor who has demonstrated the attribute of trustworthiness, as well as quality, fitness, capacity and experience to satisfactorily perform the contract. It is the County's policy to conduct business only with responsible Vendors
- 1.20.2 Vendors are hereby notified that, in accordance with [Chapter 2.202 of the County Code](#), the County may determine whether the Vendor is responsible based on a review of the Vendor's performance on any contracts, including but not limited to County contracts. Particular attention will be given to violations of labor laws related to employee compensation and benefits, and evidence of false claims made by the Vendor against public entities.
- 1.20.3 Labor law violations which are the fault of the Subcontractors and of which the Vendor had no knowledge must not be the basis of a determination that the Vendor is not responsible.
- 1.20.4 The County may declare a Vendor to be non-responsible for purposes of the ESMA if the Board, in its discretion, finds that the Vendor has done any of the following: (1) violated a term of a contract with the County or a nonprofit corporation created by the County; (2) committed an act or omission which negatively reflects on the Vendor's quality, fitness or capacity to perform a contract with the County, any other public entity, or a nonprofit corporation created by the County, or engaged in a pattern or practice which negatively reflects on same; (3) committed an act or omission which indicates a lack of business integrity or business honesty; or (4) made or submitted a false claim against the County or any other public entity.
- 1.20.5 If there is evidence that the Vendor may not be responsible, the applicable Department will notify the Vendor in writing of the evidence relating to the Vendor's responsibility, and its intention to recommend to the Board that the Vendor be found not responsible. The Department will provide the Vendor and/or the Vendor's representative with an opportunity to present evidence as to why the Vendor should be found to be responsible and to rebut evidence which is the basis for the Department's recommendation.
- 1.20.6 If the Vendor presents evidence in rebuttal to the Department, the Department will evaluate the merits of such evidence, and based on that evaluation, make a recommendation to the Board of Supervisors. The final decision concerning the responsibility of the Vendor must reside with the Board of Supervisors.
- 1.20.7 These terms will also apply to proposed Subcontractors of Vendors on County contracts.

1.21 Vendor Debarment:

- 1.21.1 The Vendor is hereby notified that, in accordance with [Chapter 2.202 of the County Code](#), the County may debar the Vendor from bidding or proposing on, or being awarded, and/or performing work on other County contracts for a specified period of time, which generally will not exceed five (5) years but may exceed five (5) years or be permanent if warranted by the circumstances, and the County may terminate any or all of the Vendor's existing contracts with County, if the Board finds, in its discretion, that the Vendor has done any of the following:
 - (1) violated a term of a contract with the County or a nonprofit corporation created by the County; (2) committed an act or omission which negatively reflects on the Vendor's quality, fitness or capacity to perform a contract with the County, any other public entity, or a

nonprofit corporation created by the County, or engaged in a pattern or practice which negatively reflects on same; (3) committed an act or offense which indicates a lack of business integrity or business honesty; or (4) made or submitted a false claim against the County or any other public entity. These terms will also apply to proposed Subcontractors of Vendors on County contracts.

- 1.21.2 A listing of contractors that are currently on the Debarment List for Los Angeles County may be obtained on the following website: <https://doingbusiness.lacounty.gov/listing-of-contractors-debarred-in-los-angeles-county/>.

1.22 Improper Considerations:

- 1.22.1 **Attempt to Secure Favorable Treatment:** It is improper for any County officer, employee, or agent to solicit consideration, in any form, from a Vendor with the implication, suggestion or statement that the Vendor's provision of the consideration may secure more favorable treatment for the Vendor in the award of an ESMA or that the Vendor's failure to provide such consideration may negatively affect the County's consideration of the Vendor's submission. A Vendor must not offer or give either directly or through an intermediary, consideration, in any form, to a County officer, employee, or agent for the purpose of securing favorable treatment with respect to the award of an ESMA.
- 1.22.2 **Notification to County:** A Vendor must immediately report any attempt by a County officer, employee, or agent to solicit such improper consideration. The report must be made to the Los Angeles County Fraud Hotline at (800) 544-6861 or <https://fraud.lacounty.gov/>. Failure to report such a solicitation may result in the Vendor's submission being eliminated from consideration.
- 1.22.3 **Form of Improper Consideration:** Among other items, such improper consideration may take the form of cash, discounts, services, the provision of travel or entertainment, or tangible gifts.

1.23 Notice to Vendors Regarding the County Lobbyist Ordinance:

The Board has enacted an ordinance regulating the activities of persons who lobby County officials. This ordinance, referred to as the "Lobbyist Ordinance", defines a County Lobbyist and imposes certain registration requirements upon individuals meeting the definition. The complete text of the ordinance can be found in [County Code Chapter 2.160](#). In effect, each person, corporation or other entity that seeks a County permit, license, franchise or contract must certify compliance with the ordinance. As part of this solicitation process, it will be the responsibility of each Vendor to review the ordinance independently as the text of said ordinance is not contained within this RFSQ. Thereafter, each person, corporation or other entity submitting a response to this solicitation, must certify that each County Lobbyist, as defined by [Los Angeles County Code Section 2.160.010](#), retained by the Vendor is in full compliance with [Chapter 2.160 of the Los Angeles County Code](#) and each such County Lobbyist is not on the Executive Office's List of Terminated Registered Lobbyists.

1.24 Consideration of GAIN/GROW Participants for Employment:

As a threshold requirement for consideration of an ESMA, Vendors must demonstrate a proven record of hiring participants in the County's [Department of Public Social Services Greater Avenues for Independence \(GAIN\) or General Relief Opportunity for Work \(GROW\) Programs](#) or must attest to a willingness to consider GAIN/GROW participants for any future employment openings if they

meet the minimum qualifications for that opening. Additionally, Vendors must attest to a willingness to provide employed GAIN/GROW participants access to the Vendor's employee mentoring program, if available, to assist these individuals in obtaining permanent employment and/or promotional opportunities. Vendors who are unable to meet this requirement must not be considered for an ESMA.

Vendors must submit a completed SOQ Form 3 ([Certification of Compliance](#)) of Appendix A ([Required SOQ Forms](#)), as part of their SOQ.

1.25 Jury Service Program:

The prospective ESMA is subject to the requirements of the County's Contractor Employee Jury Service Ordinance ("Jury Service Program") ([Los Angeles County Code, Chapter 2.203](#)). Prospective Contractors should carefully read Paragraph 58.0 (Compliance with County's Jury Service Program) of the Appendix D ([Sample Master Agreement](#)), both of which are incorporated by reference into and made a part of this RFSQ. The Jury Service Program applies to both Qualified Contractors and their Subcontractors. **SOQs that fail to comply with the requirements of the Jury Service Program will be considered non-responsive and excluded from further consideration.**

1.25.1 Contractor must certify compliance with County's Contractor Employee Jury Service Ordinance in SOQ Form 3 (Certification of Compliance) of Appendix A (Required SOQ Forms). If a Qualified Contractor does not fall within the Jury Service Program's definition of "Contractor" or if it meets any of the exceptions to the Jury Service Program, then the Contractor must so indicate in SOQ Form 3, and include with its submission all necessary documentation to support the claim such as tax returns or a collective bargaining agreement, if applicable. Upon reviewing the Contractor's application, the County will determine, in its sole discretion, whether the Contractor falls within the definition of Contractor or meets any of the exceptions to the Jury Service Program. The County's decision will be final.

1.26 County's Preference Programs:

OVERVIEW OF COUNTY'S PREFERENCE PROGRAMS

1.26.1 The County of Los Angeles has three preference programs. The Local Small Business Enterprise (LSBE), Disabled Veteran Business Enterprise (DVBE), and Social Enterprise (SE). The Board of Supervisors encourages business participation in the County's contracting process by continually streamlining and simplifying our selection process and expanding opportunities for these businesses to compete for County opportunities.

1.26.2 The Preference Programs (LSBE, DVBE, and SE) require that a business complete certification prior to requesting a preference in a solicitation. This program and how to obtain certification are further explained in Sections 1.27, 1.29 and 1.30 of this solicitation. Additional information on the County's preference programs is also available on the Department of Consumer and Business Affairs' (DCBA) website at: <http://dcba.lacounty.gov>.

1.26.3 In no case will the Preference Programs (LSBE, DVBE, and SE) price or scoring preference be combined with any other county preference program to exceed fifteen percent (15%) in response to any County solicitation.

1.26.4 Sanctions and financial penalties may apply to a business that knowingly, and with intent to defraud, seeks to obtain or maintain certification as a certified LSBE, DVBE, or SE when not qualified.

1.27 Local Small Business Enterprise (LSBE) Preference Program:

- 1.27.1 In reviewing WO Bids, the County will give LSBE preference to businesses that meet the definition of a LSBE, consistent with [Chapter 2.204 of the Los Angeles County Code](#).
- 1.27.2 To apply for certification as an LSBE, businesses should contact the DCBA at <http://dcba.lacounty.gov>.
- 1.27.3 Certified LSBEs may only request the preference in each of their WO Bid responses and may not request the preference unless the certification process has been completed and certification is affirmed. Businesses must complete and submit the Request for Preference Program Consideration with each WO Bid response and submit a letter of certification from the DCBA with their bid. Sanctions and financial penalties may apply to a business that knowingly, and with intent to defraud, seeks to obtain or maintain certification as a certified LSBE.

1.28 Local Small Business Enterprise (LSBE) Prompt Payment Program:

It is the intent of the County that Certified LSBEs receive prompt payment for services they provide to County Departments. Prompt payment is defined as fifteen (15) calendar days after receipt of an undisputed invoice consistent with [Chapter 3.035 of the Los Angeles County Board of Supervisors Policy Manual](#).

1.29 Social Enterprise (SE) Preference Program:

- 1.29.1 In reviewing WO Bids, the County will give preference during the solicitation process to businesses that meet the definition of a SE, consistent with [Chapter 2.205 of the Los Angeles County Code](#).
- 1.29.2 To apply for certification as an SE, businesses should contact DCBA at <http://dcba.lacounty.gov>.
- 1.29.3 Certified SEs may only request the preference in each of their WO Bid responses and may not request the preference unless the certification process has been completed and certification is affirmed. Businesses must complete and submit the Request for Preference Program Consideration with each WO Bid response and submit their SE certification letter ("Certification for Non-Federally Funded Solicitations") from the DCBA with their bid.

1.30 Disabled Veteran Business Enterprise Preference Program (DVBE):

In reviewing In reviewing WO Bids, the County will give preference during the solicitation process to businesses that meet the definition of a DVBE, consistent with [Chapter 2.211 of the Los Angeles County Code](#).

- 1.30.1 The business must be certified by DCBA, prior to requesting the DVBE preference in a solicitation. To apply for certification as a DVBE, businesses should contact DCBA at <http://dcba.lacounty.gov>.
- 1.30.2 Certified DVBEs may only request the preference in each of their WO Bid responses and may not request the preference unless the certification process has been completed and certification is affirmed. Businesses must complete and submit the Request for Preference Program Consideration with each WO Bid response and submit their DVBE certification approval letter from the DCBA with their bid.

1.31 Notification to County of Pending Acquisitions/Mergers by Proposing Company:

To the extent legally permitted, Vendors must provide written notification to the County of any pending acquisitions/mergers of their company unless otherwise legally prohibited from doing so. If the Vendor is restricted from legally notifying the County of pending acquisitions/mergers, then it should notify the County of the actual acquisitions/mergers as soon as the law allows and provide to the County the legal framework that restricted it from notifying the County prior to the actual acquisitions/mergers. This information must be provided by the Vendor on SOQ Form 1 ([Proposer's Organization Questionnaire/Affidavit](#)) of Appendix A ([Required SOQ Forms](#)). Failure of the Vendor to provide this information SOQ may eliminate its SOQ(s) from any further consideration. Vendor should have a continuing obligation to notify the County and update any changes to its response in SOQ Form 1 during the solicitation.

1.32 Contractor's Obligations as a "Business Associate" (HIPAA):

Contractors, whose performance of the activities under a WO involves access to Protected Health Information as defined in 45 C.F.R. § 160.103, will be required to comply with the Administrative Simplification requirements and prohibitions of the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 (HIPAA), and regulations promulgated thereunder, including the Privacy, Security, Breach Notification, and Enforcement Rules at 45 Code of Federal Regulations (C.F.R.) Parts 160 and 164 as contained in Exhibit G (ESMA HIPAA Business Associate Agreement) of Appendix D ([Sample Master Agreement](#)).

1.33 Defaulted Property Tax Reduction Program:

The prospective ESMA is subject to the requirements of the County's Defaulted Property Tax Reduction Program ("Defaulted Tax Program") [Los Angeles County Code, Chapter 2.206](#). Prospective Contractors should carefully read the pertinent provisions of Appendix D (Sample Master Agreement), Paragraph 25.0 (Contractor's Warranty of Compliance with County's Defaulted Property Tax Reduction Program) and Section 56.8 (Termination for Breach of Warranty to Maintain Compliance with County's Defaulted Property Tax Reduction Program), both of which are incorporated by reference into and made a part of this solicitation. The Defaulted Tax Program applies to both Qualified Contractors and their Subcontractors.

Vendors must be required to certify that they are in full compliance with the provisions of the Defaulted Tax Program and must maintain compliance during the term of any contract that may be awarded pursuant to this solicitation or must certify that they are exempt from the Defaulted Tax Program by completing SOQ Form 3 ([Certification of Compliance](#)) of Appendix A (Required SOQ Forms). Failure to maintain compliance, or to timely cure defects, may be cause for termination of a contract or initiation of debarment proceedings against the non-compliance contractor ([Los Angeles County Code, Chapter 2.202](#)).

SOQs that fail to comply with the certification requirements of the Defaulted Tax Program will be considered non-responsive and excluded from further consideration.

1.34 Vendor's Acknowledgement of County's Commitment to Zero Tolerance Policy on Human Trafficking:

On October 4, 2016, the Los Angeles County Board of Supervisors approved a motion taking significant steps to protect victims of human trafficking by establishing a zero tolerance policy on human

trafficking. The policy prohibits Vendors engaged in human trafficking from receiving contract awards or performing services under a County contract.

Qualified Contractors are required to complete SOQ Form 3 ([Certification of Compliance](#)) of Appendix A ([Required SOQ Forms](#)), certifying that they are in full compliance with the County's Zero Tolerance Policy on Human Trafficking provision as defined in Paragraph 77.0 (Compliance with County's Zero Tolerance Policy on Human Trafficking) of Appendix D ([Sample Master Agreement](#)). Further, contractors are required to comply with the requirements under said provision for the term of any ESMA awarded pursuant to this solicitation.

1.35 Default Method of Payment: Direct Deposit or Electronic Funds Transfer:

- 1.35.1 The County, at its sole discretion, has determined that the most efficient and secure default form of payment for goods and/or services provided under an agreement/contract with the County will be Electronic Funds Transfer (EFT) or direct deposit, unless an alternative method of payment is deemed appropriate by the Auditor-Controller (A-C).
- 1.35.2 Upon contract award or at the request of the A-C and/or the contracting department, the Contractor must submit a direct deposit authorization request with banking and Vendor information, and any other information that the A-C determines is reasonably necessary to process the payment and comply with all accounting, record keeping, and tax reporting requirements.
- 1.35.3 Any provision of law, grant, or funding agreement requiring a specific form or method of payment other than EFT or direct deposit will supersede this requirement with respect to those payments.
- 1.35.4 Upon contract award or at any time during the duration of the agreement/ contract, a Contractor may submit a written request for an exemption to this requirement. The A-C, in consultation with the contracting department(s), will decide whether to approve exemption requests.

1.36 Vendor's Acknowledgement of County's Commitment to Employment Hiring Practices:

On May 29, 2018, the Los Angeles County Board of Supervisors approved a Fair Chance Employment Policy in an effort to remove job barriers for individuals with criminal records. The policy requires businesses that contract with the County to comply with fair chance employment hiring practices set forth in [California Government Code Section 12952](#).

Qualified Contractors are required to complete SOQ Form 3 ([Certification of Compliance](#)) of Appendix A (Required SOQ Forms), certifying that they are in full compliance with [Section 12952](#), as indicated in the Master Agreement. Further, contractors are required to comply with the requirements under [Section 12952](#) for the term of any ESMA awarded pursuant to this solicitation.

1.37 Prohibition from Participation in Future Solicitation(s):

A Proposer, or a Contractor or its subsidiary or Subcontractor ("Proposer/Contractor"), is prohibited from submitting a bid or proposal in a County solicitation if the Proposer/Contractor has provided advice or consultation for the solicitation.

A Proposer/Contractor is also prohibited from submitting a bid or proposal in a County solicitation if the Proposer/Contractor has developed or prepared any of the solicitation materials on behalf of the County. A violation of this provision will result in the disqualification of the Contractor/Proposer from participation in the County solicitation or the termination or cancellation of any resultant County contract. ([Los Angeles County Code, Chapter 2.202](#))

1.38 COVID-19 Vaccinations of County Contractor Personnel:

Vendors are advised that it must comply with [Chapter 2.212 \(COVID-19 Vaccinations of County Contractor Personnel\)](#) of County Code Title 2 - Administration, Division 4 as a condition of performing work under any awarded contract resulting from this solicitation. Vendors are advised to review the requirements of [Chapter 2.212 \(COVID-19 Vaccinations of County Contractor Personnel\)](#) and the sample contract requirements prior to submitting a SOQ to this solicitation. A completed Attachment B4 (COVID-19 Certification of Compliance) as set forth in Exhibit B (Sample Work Order) of Appendix D ([Sample Master Agreement](#)) is a required part of any agreement with the County.

1.39 Community Business Enterprise Participation:

The County has adopted a CBE Program, which includes business enterprises owned by disabled veterans, disadvantaged business enterprises, minority and women-owned businesses, and lesbian, gay, bisexual, transgender, queer, and questioning-owned business enterprises. The County has established an annual goal that 25 percent of all County must be reflected in SOQ Form 7 ([Community Based Enterprise \(CBE\) Information](#)) provided in Appendix A ([Required SOQ Forms](#)).

All Vendors must document good faith efforts it has taken to assure that CBEs are utilized, when possible, to provide supplies, equipment, technical services, and other services under this contract. The Vendor must make documents related to these good faith efforts available to the County upon request.

To obtain a list of firms that are certified by the County in the CBE Program, send an e-mail request to the County of Los Angeles Workforce Development Aging and Community Services (WDACS): CBESBE@wdacs.lacounty.gov with the subject "Request for CBE Listing." For additional information contact the Office of Small Business at: (844) 432-4900 or at OSB@wdacs.lacounty.gov.

The County strongly encourages participation by CBEs; however, the final selection will be made without regard to race, color, creed, or gender. The final selection will be based on the Vendor's ability to provide the best service and value to the County.

2.0 INSTRUCTIONS TO VENDORS

This Paragraph contains instructions to Vendors regarding how to prepare and submit the Statement of Qualifications (SOQ).

2.1 County Responsibility:

The County is not responsible for representations made by any of its officers or employees prior to the execution of the ESMA unless such understanding or representation is included in the ESMA.

2.2 Truth and Accuracy Representations:

False, misleading, fraudulent, incomplete, or deceptively unresponsive statements in connection with an SOQ will be sufficient cause for disqualification of the SOQ. The evaluation and determination in this area will be at the ISD's sole judgment and his/her judgment will be final. A Contractor who is disqualified pursuant to this Section 2.2, may be debarred from working with the County.

If the County is unable to verify the Contractor's prior experience, the submitted SOQ will be rejected without further review or consideration. County will provide detailed reasons for the rejection and will allow the Contractor to re-submit the SOQ with verifiable references.

Failure to adhere to SOQ format as described in Section 2.5 ([Preparation and Format of SOQ](#)) will result in the SOQ being rejected. If the SOQ is rejected, County will provide detailed reasons for the rejection and will allow the Contractor an opportunity to resolve any discrepancy and re-submit the SOQ.

2.3 RFSQ Timetable:

Release of the RFSQ	July 28, 2022
Written Questions Due	August 8, 2022
Request for a Solicitation Requirements Review Due	August 8, 2022
Q&A Conference (Attendance Optional)	August 11, 2022
<i>11:00 a.m. (Pacific Time)</i> <i>Teams Call-In #: +(323) 776-6996</i> <i>Conference ID: 825 689 730#</i> Click here to join the meeting	

Final Questions and Answers Released the Week of	August 15, 2022
SOQ submission due date	Open Continuously

2.4 Solicitation Requirements Review:

Any person or entity may seek a Solicitation Requirements Review by submitting Appendix E ([Transmittal to Request a Solicitation Requirements Review](#)) to the County as described in this Section 2.4. A request for a Solicitation Requirements Review may be denied, in ISD's sole discretion, if the request does not satisfy all of the following criteria:

1. The request for a Solicitation Requirements Review is made within ten (10) business days of the issuance of the solicitation document.

2. The request for a Solicitation Requirements Review includes documentation, which demonstrates the underlying ability of the person or entity to submit a proposal.
3. The request for a Solicitation Requirements Review itemizes in appropriate detail, each matter contested and factual reasons for the requested review.
4. The request for a Solicitation Requirements Review asserts either that:
 - a. Application of the minimum requirements, evaluation criteria and/or business requirements unfairly disadvantages the person or entity; or,
 - b. Due to unclear instructions, the process may result in the County not receiving the best possible responses from prospective Vendor.

2.5 Preparation and Format of SOQ:

- 2.5.1 All SOQs must be submitted electronically in the prescribed format. Any SOQ that deviates from this format may be rejected without review and without further consideration in the County's sole discretion. If the SOQ is rejected, County will provide detailed reasons for rejection and will allow the Vendor to resolve any discrepancy and re-submit at any time.

The content and sequence of the SOQ must be as follows:

- ▶ Transmittal Letter ([See Section 2.5.2](#))
 - ▶ Table of Contents ([See Section 2.5.3](#))
 - ▶ Vendor's Organization ([See Section 2.5.4](#))
 - ✓ [SOQ Form 1](#): Proposer's Organization Questionnaire/Affidavit
 - ▶ Vendor's Qualifications ([See Sections 2.5.5](#))
 - ✓ [SOQ Form 2](#): Vendor's Qualifications
 - ▶ Vendor's Proof of Insurability ([See Section 2.5.7](#))
 - ▶ Additional Required Forms ([See Section 2.5.8](#))
 - ✓ [SOQ Form 3](#): Certification of Compliance
 - ✓ [SOQ Form 4](#): Request for Preference Consideration
 - ✓ [SOQ Form 5](#): Proposer's Debarment History and List of Terminated Contracts
 - ✓ [SOQ Form 6](#): Declaration
 - ✓ [SOQ Form 7](#): Community Business Enterprise (CBE) Information
 - ▶ ESMA Execution Required Forms ([See Section 2.5.9](#))
 - ✓ [Exhibit D](#): Contractor's Administration
 - ✓ [Page 63](#): Authorization of the ESMA Signatures Page
- 2.5.2 **Transmittal Letter:** The transmittal letter must be a maximum of one (1) page, on Vendor's letterhead. It must be dated and must include the Vendor's name, address, telephone and facsimile numbers of the person(s) to be used for contact and who will be authorized to

represent the Vendor. The letter must indicate that the Vendor has reviewed the RFSQ and the ESMA, including any addenda issued by the County, and that it understands and agrees that by responding to the RFSQ, should it be found to be a Qualified Contractor, it is agreeing in advance thereof to all terms and conditions of the ESMA. The transmittal letter must bear the original signature of the person authorized to sign on behalf of the Vendor and who can legally bind the Vendor in an ESMA. Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D ([Sample Master Agreement](#)).

2.5.3 **Table of Contents**: The Table of Contents must be a comprehensive listing of all of the material included in the SOQ. It must contain each Section number for reference, the precise title of each Section of the material, and provide accurate, sequential page numbers for all Sections.

2.5.4 **Vendor's Organization**: The Vendor must complete, sign and date [SOQ Form 1](#) (Proposer's Organization Questionnaire/Affidavit) of Appendix A ([Required SOQ Forms](#)). Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D ([Sample Master Agreement](#)). **SOQ Form 1 must bear the original signature of the person authorized to sign on behalf of the Vendor and who can legally bind the Vendor in an ESMA.**

Based on Vendor's organizational structure, Vendor must determine which of the below referenced supporting documents the County requires. If the Vendor's organization does not fit into one of these categories, upon receipt of the SOQ or at some later time, the County may, in its discretion, request additional documentation regarding the Vendor's business organization and authority of individuals to sign Contracts.

If the below referenced documents are not available at the time of SOQ submission, Vendors must request the appropriate documents below and provide a statement on the status of the request with the SOQ.

Required Support Documents:

▶ **Corporations or Limited Liability Company (LLC)**: The Vendor must submit the following documentation with the SOQ:

1. A copy of a "Certificate of Good Standing" with the state of incorporation/organization.
2. A conformed copy of the most recent "Statement of Information" as filed with the California Secretary of State listing corporate officers or members and managers.

▶ **Limited Partnership**: The Vendor must submit a conformed copy of the Certificate of Limited Partnership or Application for Registration of Foreign Limited Partnership as filed with the California Secretary of State, and any amendments.

2.5.5 **Vendor's Qualifications**: Vendor must use [SOQ Form 2](#) (Vendor's Qualifications) of Appendix A ([Required SOQ Forms](#)) to demonstrate that it meets the Minimum Qualifications for specific Service Category(ies) and/or Subcategory(ies) as set forth in Appendix B ([ESMA Service Categories](#)) for which it is seeking to qualify. Vendors are instructed to use the forms as provided in this RFSQ and refrain from modifying or reproducing the required forms or it may result in the entire SOQ being disqualified without

further consideration in the County's sole discretion. **Vendor must submit a separate SOQ Form 2 for each Service Category/Subcategory for which it wishes to be considered qualified. The County will NOT determine which Service Categories are appropriate for the vendor.**

- A. **ESMA Service Category Minimum Qualifications Verification:** The Vendor must complete this Section of SOQ Form 2 (Vendor's Qualifications) of Appendix A (Required Forms) to describe the engagements required for **each** Service Category and/or Subcategory(ies) specified in Appendix B (ESMA Service Categories) for which the Vendor intends to qualify.

The Vendor must utilize this Section of SOQ Form 2 to demonstrate that it has the relevant background, experience, requisite years of experience, and requisite number of engagements of sufficient length, to meet the Minimum Qualifications for **each** Service Category and/or Subcategory(ies) the Vendor intends to qualify for as set forth in Section 1.5 ([Vendor's Minimum Qualifications](#)) and Appendix B (ESMA Service Categories) a single engagement may be used to qualify the Vendor for more than one Service Category, but it is the Vendor's responsibility to ensure that the engagement and the Vendor's experience and technological accomplishments are described with sufficient specificity to demonstrate that the Vendor meets the Minimum Qualifications set forth in Section 1.5 and Appendix B.

All the engagements listed by the Vendor must have been performed for organizations other than the Vendor's own organization. However, Vendors may list engagements in which the Vendor performed the requisite work as a subcontractor to a prime contractor, but must identify such engagements. Additional engagement requirements may be specified in Appendix B.

Each distinct engagement included in this Section of SOQ Form 2 must include a comprehensive narrative for each engagement, in the appropriate location within the Form, and provide a sufficiently detailed and comprehensive description of the Vendor's experience (e.g. nature of the technical work performed, Vendor responsibilities, how the work was accomplished, etc.) during the engagement that demonstrates how the Vendor meets all of the Minimum Qualifications described in Section 1.5 and Appendix B for the Service Category(ies) and/or Subcategory(ies) for which the Vendor intends to qualify.

The County, in its sole discretion, will determine whether the information provided in this Section of SOQ Form 2 demonstrates sufficient qualifying engagements and a sufficient length of work experience to qualify the Vendor for a specific Service Category and/or Subcategory.

Failure to provide a sufficiently detailed and comprehensive engagement description this Section of SOQ Form 2 may result in the SOQ being disqualified without further consideration in the County's sole discretion.

If an SOQ is disqualified, and Vendor remains interested in being an ESMA Qualified Contractor, Vendor must resubmit the SOQ package in its entirety.

- B. **ESMA Service Category Minimum Qualifications Affirmation:** The Vendor must complete the applicable Section of SOQ Form 2 ([Vendor's Qualifications](#)) of Appendix A ([Required](#)

[SOQ Forms](#)) to certify that the information provided in Section B. ([ESMA Service Category Minimum Qualification Verification](#)) of SOQ Form 2 is true and correct to the best of his or her information and belief. Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D ([Sample Master Agreement](#)). **This Section of SOQ Form 2 must bear the signature of the person authorized to sign on behalf of the Vendor and to bind the applicant in an ESMA.**

Failure to sign and/or submit this Section of SOQ Form 2 may result in the entire SOQ being disqualified without further consideration in the County's sole discretion. If SOQ is disqualified because of failure to complete this Section of SOQ Form 2, County will provide reasons for disqualification and will allow Vendor to correct this Section of SOQ Form 2 and re-submit.

- C. **Vendor's References:** The Vendor must use this Section of SOQ Form 2 (Vendor's Qualifications) of Appendix A (Required SOQ Forms), to provide the following information regarding Vendor's References.

The Vendor must provide information for the references required for each ESMA Service Category and/or Subcategory on SOQ Form 2 to substantiate each of the separate, distinct engagements for each of the Service Category and/or Subcategory for which the Vendor intends to qualify.

The Vendor may use additional forms, if necessary, but the form must in no way be altered from its original format or it may result in the entire SOQ being disqualified without further consideration in the County's sole discretion.

It is the Vendor's sole responsibility to ensure that the reference company name, point of contact's name, title, email address, phone number, and fax number, if applicable, for each reference is accurate. It is also the Vendor's sole responsibility to inform the references that the County will be contacting them during the County's normal working hours.

The County will exercise reasonable diligence in contacting references. However, the County assumes no responsibility if the contact information the Vendor provides is not accurate.

The County, in its sole discretion, may disqualify a Vendor from further consideration if:

1. References fail to substantiate the Vendor's engagements and/or the description of services provided in the engagements for each Service Category the Vendor intended to qualify for; or
2. References fail to support that Vendor has a continuing pattern of providing capable, productive and skilled personnel; or
3. The County is unable to successfully reach the point of contact with reasonable effort; or
4. Vendor lists a reference for an engagement that is located in a foreign country and in that foreign country the application of skills in the business environment differs from that in the United States to such a degree that the relevance of the experience is questionable.

2.5.6 **Vendor's Pending Litigation and Judgments:** The County will conduct a review of Vendor's pending litigation and judgments. Vendor must identify by name, case and court jurisdiction any pending litigation in which Vendor is involved, or judgments against Vendor in the past five (5) years. Additionally, Vendor must provide a statement describing the size and scope of any pending or threatening litigation against the Vendor or principals of the Vendor.

2.5.7 **Vendor's Proof of Insurability:** The Vendor must provide proof of insurance that meet all the insurance requirements set forth in Paragraph 42.0 (General Provisions for All Insurance Coverage) and Paragraph 43.0 (Insurance Coverage) of Appendix D ([Sample Master Agreement](#)).

In the event that the Vendor does not have the required insurance coverage set forth in Paragraph 42.0 and Paragraph 43.0 of Appendix D at the time of SOQ submission, the Vendor may submit with its SOQ, a letter from a qualified insurance carrier indicating its willingness to provide the Vendor with the required insurance coverage set forth in Paragraph 42.0 and Paragraph 43.0 of Appendix D should the Vendor be selected and awarded an ESMA.

If the Vendor is qualified to be awarded an ESMA, the ESMA will not be executed by the County until such time as the Vendor has submitted, and the County has accepted, its insurance coverage that meet all the insurance requirements set forth in Paragraph 42.0 and Paragraph 43.0 of Appendix D.

2.5.8 **Additional SOQ Required Forms:** The following list of forms are provided in Appendix A ([Required SOQ Forms](#)) and **must** be submitted as part of the SOQ.

- ▶ [SOQ FORM 3](#): Certification of Compliance
- ▶ [SOQ FORM 4](#): Request for Preference Consideration
- ▶ [SOQ FORM 5](#): Proposer's Debarment History and List of Terminated Contracts
- ▶ [SOQ FORM 6](#): Declaration
- ▶ [SOQ FORM 7](#): Community Business Enterprise (CBE) Information

2.5.9 **ESMA Execution Required Forms:** The following list of forms (refer to Appendix D ([Sample Master Agreement](#))) are also provided in Appendix A ([Required SOQ Forms](#)) of this RFSQ and must be completed, signed and submitted as part of the SOQ. Forms will be used at the time of execution of the ESMA, if the Vendor submitting a response to this RFSQ is deemed qualified and thereby becomes a Qualified Contractor. Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D.

- ▶ [EXHIBIT D](#): Contractor's Administration
- ▶ [PAGE 63](#): Authorization of the ESMA Signatures Page

2.6 SOQ Submission:

The Vendor must submit, as prescribed in Section 2.5 ([Preparation and Format of SOQ](#)):

- An electronic copy in PDF format submitted via email to the ESMA Administrator (esmaadmin@isd.lacounty.gov) with the words **"SOQ For Enterprise Services Master Agreement (ESMA) 2022"** in the subject line of the email and the name and address of the Vendor in the body of the email.

It is the Vendor's responsibility to ensure the submission and all related forms are signed in accordance with this RFSQ. Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D (Sample Master Agreement).

2.7 SOQ Withdrawals:

A Vendor may withdraw its SOQ at any time and resubmit at any further date while the RFSQ is open.

2.8 Acceptance of Terms and Conditions of Master Agreement:

Vendors understand and agree that submission of the SOQ constitutes acknowledgement and acceptance of, and a willingness to comply with, all terms and conditions of Appendix D (Sample Master Agreement).

3.0 SOQ REVIEW, SELECTION, AND QUALIFICATION PROCESS

The County reserves the sole right to judge the contents of the SOQ submitted pursuant to the RFSQ and to review, evaluate, and qualify the Vendors. The following rules and procedures govern the selection of Vendors to become Qualified Contractors under the ESMA.

3.1 Review, Selection and Qualification Process:

SOQs will be subject to a detailed review by qualified County staff. The review process will include the following steps:

3.1.1 **Adherence to the Minimum Qualifications:** The County will review the Vendor's SOQ in its entirety in accordance with Section 2.5 ([Preparation and Format of SOQ](#)) of this RFSQ to determine if the Vendor meets the Minimum Qualifications specified in Section 1.5 ([Vendor's Minimum Qualifications](#)) and Appendix B ([ESMA Service Categories](#)) for **each** Service Category for which the Vendor intends to qualify. The review will include verification of references submitted, a review of the County's Contract Database and Contractor Alert Reporting Database, if applicable, reflecting past performance history on County or other contracts, and a review of terminated contracts.

- ▶ Failure of the Vendor to comply with and demonstrate that it meets the Minimum Qualifications set forth in Section 1.5 and Appendix B for **each** Service Category which the Vendor intends to qualify, may result in the SOQ being disqualified without further review and consideration in the County's sole discretion. The County, in its sole discretion, reserves the right to waive any informality in an SOQ if the sum and substance of the SOQ is present.
- ▶ The County will contact every reference provided by the Vendor on **each** SOQ Form 2 ([Vendor's Qualifications](#)) of Appendix A ([Required SOQ Forms](#)) for **each** separate, distinct engagement for **each** Service Category and/or Subcategory(ies) for which the Vendor intends to qualify. The County will verify the Vendor's relevant background, experience, requisite years of experience, and requisite number of engagements of sufficient length, to meet the Minimum Qualifications for **each** Service Category and/or Subcategory for which the Vendor intends to qualify as set forth in Section 1.5 and Appendix B.
- ▶ A review of the Vendor's pending litigation or judgments will be conducted to determine, amongst other things, the magnitude of any pending litigation or judgments against the Vendor.
- ▶ An inquiry to determine the operational and financial capability and responsibility of a Vendor may be conducted by the County. The failure of a Vendor to promptly supply information in connection with such inquiry, including but not limited to, information regarding past performance, financial capability, and ability to perform on schedule, may result in the SOQ being disqualified without further consideration, in the County's sole discretion.

- ▶ False, incomplete, or unresponsive statements in connection with a Vendor's SOQ will result in the SOQ being disqualified without further consideration at the County's sole discretion.
- ▶ Failure to adhere to SOQ format as described in Section 2.5 ([Preparation and Format of SOQ](#)); will result in the SOQ being disqualified. If SOQ is disqualified, County will provide detailed reasons for disqualification and will allow the Vendor to resolve any discrepancy and re-submit.

3.1.2 **Vendor's Proof of Insurability:** The County will review the Vendor's insurance in accordance with Section 2.5.7 ([Vendor's Proof of Insurability](#)) of this RFSQ to ensure that it meets the required insurance coverage as set forth in Paragraph 42.0 (General Provisions for All Insurance) and Paragraph 43.0 (Insurance Coverage) of Appendix D ([Sample Master Agreement](#)).

3.1.3 **Additional Required Forms:** The County will review all the forms required in accordance with Section 2.5 (Preparation and Format of SOQ) of this RFSQ.

3.2 Disqualification Review:

An SOQ may be disqualified from consideration because ISD has determined it contains false, misleading, fraudulent, incomplete, deceptively unresponsive statements, and/or is otherwise non-responsive at any time during the review/evaluation process. If ISD determines that a SOQ is disqualified, ISD will notify the Vendor in writing.

Upon receipt of the written determination of disqualification, the Vendor may submit a written request for a Disqualification Review within the timeframe specified in the written determination.

A request for a Disqualification Review may, in ISD's sole discretion, be denied if the request does not satisfy all of the following criteria:

1. The request for a Disqualification Review is submitted within the timeframe specified in the notice of disqualification; and
2. The request for a Disqualification Review asserts that the ISD's determination of disqualification due to non-responsiveness was erroneous (e.g., factual errors, etc.) and provides factual support on each ground asserted as well as copies of all documents and other material that support the assertions.

The Disqualification Review will be completed and the determination will be provided to the requesting Vendor, in writing, prior to the conclusion of the evaluation process.

3.3 Selection/Qualification Process:

The ISD will generally select Vendors that have experience in providing a broad range of IT consulting services. However, in order to insure ISD has a varied pool of Qualified Contractors, the ISD may offer ESMA's to Vendors that offer a narrow scope of services in more highly specialized areas.

3.4 Master Agreement Award:

Vendors who are notified by the ISD that they appear to have the necessary qualifications and experience (i.e., they are qualified) may still not be recommended for an ESMA if other requirements necessary for award have not been met. Other requirements may include acceptance of the terms

and conditions of the ESMA, and/or satisfactory documentation that required insurance will be obtained. Only when all such matters have been demonstrated to the ISD's satisfaction can a Vendor, which is otherwise deemed qualified, be regarded as "selected" for recommendation of an ESMA.

The ISD will execute Board-authorized ESMA's with each selected Vendor. All Vendors will be informed of the final selections.

APPENDIX A THROUGH APPENDIX E

TO THE
ESMA RFSQ



FOR
ENTERPRISE INFORMATION TECHNOLOGY SERVICES

ESMA RFSQ APPENDICES

- [APPENDIX A:](#) **Required SOQ Forms:** Includes forms that must be completed and included in the SOQ.
- [APPENDIX B:](#) **ESMA Service Categories:** Describes the various Service Categories and respective qualifications required for this RFSQ.
- [APPENDIX C:](#) **Sample Work Order Solicitation:** A sample solicitation template that describes the objective of the project, the specific Service Category(ies) being solicited for, a general description of the scope of services to be performed, any additional minimum requirements or other qualifying information, the evaluation criteria that will be applied to the WOS responses and general instructions for filing WOS responses.
- [APPENDIX D:](#) **Sample Master Agreement:** The ESMA used for this solicitation. As previously noted, the terms and conditions set forth in the ESMA are not negotiable.
- [APPENDIX E:](#) **Transmittal to Request a Solicitation Requirements Review:** Transmittal sent to Department requesting a Solicitation Requirements Review.

REQUIRED SOQ FORMS

*Required SOQ Forms and ESMA Execution Required Forms **must** bear the original signature of the person authorized to sign on behalf of the Vendor and who can legally bind the Vendor in an ESMA. Electronic representations of original signatures are acceptable pursuant to Paragraph 33.0 (Counterparts and Electronic Signatures and Representations) of Appendix D ([Sample Master Agreement](#)).*

- [SOQ FORM 1](#): PROPOSER'S ORGANIZATION QUESTIONNAIRE/AFFIDAVIT
- [SOQ FORM 2](#): VENDOR'S QUALIFICATIONS
- [SOQ FORM 3](#): CERTIFICATION OF COMPLIANCE
- [SOQ FORM 4](#): REQUEST FOR PREFERENCE CONSIDERATION
- [SOQ FORM 5](#): PROPOSER'S DEBAREMENT HISTORY AND LIST OF TERMINATED CONTRACTS
- [SOQ FORM 6](#): DECLARATION
- [SOQ FORM 7](#): COMMUNITY BUSINESS ENTERPRISE (CBE) INFORMATION

ESMA EXECUTION REQUIRED FORMS

(Complete, Sign & Include with above SOQ FORMS)

- [EXHIBIT D](#): CONTRACTOR'S ADMINISTRATION
- [PAGE 63](#): AUTHORIZATION OF THE ESMA SIGNATURES PAGE

SOQ FORM 1: PROPOSER'S ORGANIZATION QUESTIONNAIRE/AFFIDAVIT

Please complete, sign and date this form. The person signing the form must be authorized to sign on behalf of the Vendor and to bind the applicant in a Contract.

PROPOSER NAME:	COUNTY WEBVEN NUMBER:
ADDRESS:	
TELEPHONE NUMBER:	E-MAIL:
INTERNAL REVENUE SERVICE EMPLOYER IDENTIFICATION NUMBER:	CALIFORNIA BUSINESS LICENSE NUMBER:

1. Is your firm a corporation or limited liability company (LLC)? ☐ Yes ☐ No

If yes, complete:

Legal Name (found in Articles of Incorporation) _____

State _____ Year Inc. _____

If your firm is a limited partnership or a sole proprietorship, state the name of the proprietor or managing partner:

If your firm is a Non-Profit, Franchise or Other, Specify business structure name: (if not applicable, state "NONE")

2. Is your firm doing business under one or more DBA's? ☐ Yes ☐ No

If yes, complete:

Name	County of Registration	Year became DBA
_____	_____	_____
_____	_____	_____

3. Is your firm wholly/majority owned by, or a subsidiary of another firm? ☐ Yes ☐ No

If yes, complete:

Name of parent firm: _____

State of incorporation or registration of parent firm: _____

4. Has your firm done business as other names within last five (5) years? ☐ Yes ☐ No

If yes, complete:

Name _____ Year of Name Change _____

Name _____ Year of Name Change _____

SOQ FORM 1: PROPOSER'S ORGANIZATION QUESTIONNAIRE/AFFIDAVIT (CONTINUED)

5. List names of all joint ventures, partners, subcontractors, or others having any right or interest in this contract or proceeds thereof: (if not applicable, state "NONE")

6. Is your firm involved in any pending litigations, acquisition or mergers, including the associated company name?

☐ Yes ☐ No If yes, provide additional information regarding the pending merger:

7. Vendor acknowledges and certifies that firm meets and will comply with the ESMA Service Categories Minimum Qualifications as stated in Section 1.5 ([Vendor's Minimum Qualifications](#)), of this Request for Statement of Qualifications, as listed below.

Check the appropriate boxes:

☐ Yes ☐ No Vendor meets the Minimum Qualifications for specific Service Categories set forth in Appendix B ([ESMA Service Categories](#)). Appendix B (ESMA Service Categories) defines the type of service, specific Minimum Qualifications, the requisite number of engagements, and the years of experience required for each Service Category. These Minimum Qualifications are solely for the purpose of qualifying for, and being accepted as, a Qualified Contractor under the terms of this RFSQ. For each Work Order Solicitation subsequently posted under the ESMA, County may provide additional minimum qualifications and other specific requirements as applicable to the services required under the Statement of Work for which a Work Order is being solicited.

☐ Yes ☐ No Vendor does not have unresolved questioned cost, as identified by the Auditor-Controller, in an amount over \$100,000.00, that are confirmed to be disallowed costs by the contracting County department, and remain unpaid for a period of six months or more from the date of disallowance, unless such disallowed costs are the subject of current good faith negotiations to resolve the disallowed costs, in the opinion of the County.

VENDOR OFFICIAL NAME AND TITLE (PRINT):	
SIGNATURE:	DATE:

SOQ FORM 2: VENDOR'S QUALIFICATIONS (CONTINUED)

B. ESMA Service Category Minimum Qualifications Verification

Vendor must complete this Section of SOQ Form 2 in accordance with Section 2.5.5.A ([ESMA Service Category Minimum Qualifications Verification](#)) of this RFSQ. **Must provide minimum of three (3) references.**

Vendor must provide a comprehensive description of the Vendor's experience (e.g. nature of the technical work performed, Vendor responsibilities, how the work was accomplished, etc.) during this engagement that demonstrates how the Vendor meets all of the Minimum Qualifications described in Section 1.5 ([Vendor's Minimum Qualifications](#)) and Appendix B ([ESMA Service Categories](#)) for the ESMA Service Category and/or Subcategory for which the Vendor intends to qualify.

Name of Business/Reference: _____

Project Name: _____

Start Date: _____ End-date: _____ Duration: _____

Total Project Budget: _____ Project Size (users): _____

Reference Contact Name: _____

Phone Number: _____ Email: _____

Brief Project Description: _____

(if more detailed description is needed, please do so as a separate supplemental attachment to this SOQ Form 2)

Name of Business/Reference: _____

Project Name: _____

Start Date: _____ End-date: _____ Duration: _____

Total Project Budget: _____ Project Size (users): _____

Reference Contact Name: _____

Phone Number: _____ Email: _____

Brief Project Description: _____

(if more detailed description is needed, please do so as a separate supplemental attachment to this SOQ Form 2)

SOQ FORM 2: VENDOR'S QUALIFICATIONS (CONTINUED)

Name of Business/Reference: _____

Project Name: _____

Start Date: _____ End-date: _____ Duration: _____

Total Project Budget: _____ Project Size (users): _____

Reference Contact Name: _____

Phone Number: _____ Email: _____

Brief Project Description: _____

(if more detailed description is needed, please do so as a separate supplemental attachment to this SOQ Form 2)

C. ESMA Service Category Minimum Qualifications Affirmation

Vendor must complete and sign this Section of SOQ Form 2 ([Vendor's Qualifications](#)) in accordance with Section 2.5.5.B ([ESMA Service Category Minimum Qualifications Affirmation](#)) of this RFSQ.

On behalf of _____, I _____
(Vendor's Name) (Name of Vendor's authorized representative)

I certify that the information provided in Section B. ([ESMA Service Category Minimum Qualification Verification](#)) of this SOQ Form 2 is true and correct to the best of my information and belief.

Vendor Name

Vendor Authorized Official Title

Authorized Official's Signature

Date

SOQ FORM 3: CERTIFICATION OF COMPLIANCE

Proposer certifies compliance with all programs, policies, and ordinances specified in exhibits listed below.

1	Certification of No Conflict of Interest	<u>LACC 2.180</u>	Certifies Compliance? ☐ Yes ☐ No
2	Familiarity with the County Lobbyist Ordinance Certification	<u>LACC 2.160</u>	Certifies Compliance? ☐ Yes ☐ No
3	Zero Tolerance Policy on Human Trafficking Certification	<u>Motion</u>	Certifies Compliance? ☐ Yes ☐ No
4	Compliance with Fair Chance Employment Hiring Practices Certification	<u>Board Policy 5.250</u>	Certifies Compliance? ☐ Yes ☐ No
5	Attestation of Willingness to Consider Gain/Grow Participants	<u>Board Policy 5.050</u>	Certifies Compliance? ☐ Yes ☐ No Willing to provide GAIN/GROW participants access to employee mentoring program? ☐ Yes ☐ No ☐ N/A-program not available
6	Contractor Employee Jury Service Program Certification Form & Application for Exception	<u>LACC 2.203</u>	Certifies Compliance? ☐ Yes ☐ No If No, identify exemption: ☐ My business does not meet the definition of "contractor," as defined in the Program. ☐ My business is a small business as defined in the Program. ☐ My business is subject to a Collective Bargaining Agreement (attach agreement) that expressly provides that it supersedes all provisions of the Program.
7	Certification of Compliance with the County's Defaulted Property Tax Reduction Program	<u>LACC 2.206</u>	Certifies Compliance? ☐ Yes ☐ No If No, identify exemption:

SOQ FORM 4: REQUEST FOR PREFERENCE CONSIDERATION

INSTRUCTIONS: Proposers requesting preference consideration must complete and include this form in their proposal. Proposers may request consideration for one or more preference programs. **In order to qualify for preference, firm must be certified by the County of Los Angeles Department of Consumer and Business Affairs (DCBA). Please reference your Certification Letter issued by DCBA to determine Federal/Non-Federal preference eligibility.**

☐ PREFERENCE NOT REQUESTED

OR

☐ PREFERENCE REQUESTED (Select all that Apply)

PREFERENCE PROGRAM		REFERENCE
☐	Request for Local Small Business Enterprise (LSBE) Program Preference ☐ Certification for Non-Federally Funded County Solicitations ☐ Certification for Federally Funded County Solicitations	LACC 2.204
☐	Request for Social Enterprise (SE) Program Preference ☐ Certification for Non-Federally Funded County Solicitations ☐ Certification for Federally Funded County Solicitations	LACC 2.205
☐	Request for Disabled Veterans Business Enterprise (DVBE) Program Preference	LACC 2.211

Note: In no instance will any of the listed preference programs price or scoring be combined with any other County program to exceed fifteen percent (15%) in response to any county solicitation.

SOQ FORM 5: PROPOSER'S DEBARMENT HISTORY AND LIST OF TERMINATED CONTRACTS

Proposer's Name: _____

1. DEBARMENT HISTORY (Check one)	YES	NO
Proposer is currently debarred by a public entity	☐	☐
If yes, please provide the name of the public entity:		
2. LIST OF TERMINATED CONTRACTS (Check one)	YES	NO
Proposer has contracts that have been terminated in the past three (3) years.	☐	☐

If yes, please list all contracts that have been terminated prior to expiration within the last three (3) years.

Service: _____ Name of Entity: _____

Address: _____

Contact: _____ Telephone: _____

Email: _____

Termination Date: _____ Name/Contract No: _____

Reason for Termination: _____

Service: _____ Name of Entity: _____

Address: _____

Contact: _____ Telephone: _____

Email: _____

Termination Date: _____ Name/Contract No: _____

Reason for Termination: _____

Service: _____ Name of Entity: _____

Address: _____

Contact: _____ Telephone: _____

Email: _____

Termination Date: _____ Name/Contract No: _____

Reason for Termination: _____

SOQ FORM 6: DECLARATION

DECLARATION: I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE INFORMATION SUBMITTED IN REQUIRED SOQ FORMS 1-7 ARE TRUE AND CORRECT.

PRINT NAME:	TITLE:
SIGNATURE:	DATE:

SOQ FORM 7: COMMUNITY BUSINESS ENTERPRISE (CBE) INFORMATION

Instructions for Completing Form: The County seeks diverse broad-based participation in its contracting and strongly encourages participation by CBEs. Complete all fields listed on form. Where a field requests number or total indicate response using numerical digits only.

SECTION 1: FIRM/ORGANIZATION INFORMATION

The information requested below is for statistical purposes only. On final analysis and consideration of award, contractor/vendor will be selected without regard to race/ethnicity, color, religion, sex, national origin, age, sexual orientation or disability.

Total Number of Employees in California: _____ Using numerical digits, enter the total number of individuals employed by the firm in the state of California.				
Total Number of Employees: (including owners) _____ Using numerical digits, enter the total number of individuals employed by the firm regardless of location.				
Race/Ethnic Composition of Firm Table: Using numerical digits, enter the make-up of Owners/Partners/Associate Partners and percentage of how ownership of the firm is distributed into the Race/Ethnic Composition categories listed in the table. Final number must total 100%.				
Race/Ethnic Composition	Owners/Partners/Associate Partners		Percentage of how Ownership of the Firm is Distributed	
	Male	Female	Male	Female
Black/African American			%	%
Hispanic/Latino			%	%
Asian or Pacific Islander			%	%
American Indian			%	%
Filipino			%	%
White			%	%

SECTION 2: CERTIFICATION AS MINORITY, WOMEN, DISADVANTAGED, DISABLED VETERAN, AND LESBIAN, GAY, BISEXUAL, TRANSGENDER, QUEER, AND QUESTIONING-OWNED (LGBTQQ) BUSINESS ENTERPRISE

If the firm is currently certified as a Community Based Enterprise (CBE) by a public agency, complete the table by entering the names of the certifying Agency and placing an "X" under the appropriate CBE designation (Minority, Women, Disadvantaged, Disabled Veteran or LGBTQQ). Enter all the CBE certifications held by the firm.

If your firm is currently certified as a minority, women, disadvantaged, disabled veteran or lesbian, gay, bisexual, transgender, queer, and questioning-owned business enterprise by a public agency, complete the following:

Agency Name	Minority	Women	Disadvantaged	Disabled Veteran	LGBTQQ

Vendor further acknowledges that if any false, misleading, incomplete, or deceptively unresponsive statements in connection with this proposal are made, the proposal may be rejected. The evaluation and determination in this area will be at the Director's sole judgment and his/her judgment will be final.

ENTERPRISE SERVICES MASTER AGREEMENT



ESMA SERVICE CATEGORIES

FOR

ENTERPRISE INFORMATION TECHNOLOGY SERVICES

ESMA SERVICE CATEGORIES

CATEGORY 1: IT Strategic Planning and Enterprise Architecture Planning Services

CATEGORY 2: Project Management and Governance Planning Services

CATEGORY 3: Requirements Analysis and Solicitation Development Services

CATEGORY 4: Technical Consulting Services

Subcategory 4a: Enterprise Content Management, Analytics and Portal Services

Subcategory 4b: Electronic Forms, Workflow, Analytics and Portal Services

Subcategory 4c: Workplace Collaboration and Analytics Collaboration Services

Subcategory 4d: Analytics, Business Intelligence, Visualization and Reporting Services

Subcategory 4e: Master Data and Identity Management Services

Subcategory 4f: Geospatial Information Services

Subcategory 4g: Infrastructure, Programming, Middleware and Operating System Services

Subcategory 4h: Financial, Materials, Personnel, Timekeeping, Payroll, Customer Relationship and Facility Services

Subcategory 4i: Document Workflow and Imaging Services

Subcategory 4j: Commercial Cloud and DC1 Data Center Services

Subcategory 4k: Network, Application, Hardware and Systems Services

Subcategory 4l: System Re-engineering Services

Subcategory 4m: Commercial/Government Cloud Managed Services, Software as a Service (SaaS), Platform as a Service (PaaS), Infrastructure as a Service (IaaS), and Database as a Service (DBaaS) Services

CATEGORY 5: Information Security Risk, Mitigation and Forensics Consulting Services

Subcategory 5a: Information Security Risk Assessments and Compliance Services

Subcategory 5b: Incident Response, Breach Mitigation and Notification Services

Subcategory 5c: Computer Forensics, eDiscovery and Data Analytics Services

CATEGORY 6: Information Management and IT Transformation Services

Subcategory 6a: Develop enterprise information management, technologies and security strategies, architectures and roadmaps Services

Subcategory 6b: Develop and implement enterprise data management solutions Services

Subcategory 6c: Develop enterprise data integration strategies and implementation Services

Subcategory 6d: Develop enterprise data store platform architecture and strategies Services

Subcategory 6e: Develop and implement enterprise data analytics solutions Services

Subcategory 6f: Develop enterprise IT Transformation strategies and implementation Services

The above six (6) ESMA Service Categories were selected to support Los Angeles County's enterprise technology initiatives and enterprise technology standards. This does not preclude Los Angeles County departments from using other contracting vehicles such as the Internal Services Department (ISD) IT Managed Services Provider Contract, ISD's Invitation for Bid (IFB) or

ISD's Request For Proposals (RFP) purchasing process, or a Department developing a Request For Proposals to secure technology acquisitions and/or consulting services.

For any of the six (6) categories described herein, the following Los Angeles County Code restriction applies:

Note that vendors that perform or have performed requirements analysis and assist or have assisted County departments in preparing an RFP, Statement of Requirements or Statement of Work pursuant to a Work Order will be precluded from bidding or submitting proposals or responding to the resultant solicitation.

(Board policy 5.090 Consultant Independence: https://library.municode.com/ca/la_county_-_bos/codes/board_policy?nodeId=CH5COPU_5.090COIN)

CATEGORY 1: STRATEGIC PLANNING AND ENTERPRISE ARCHITECTURE PLANNING SERVICES

This Service Category relates to consulting services for the following:

- Develop IT strategic plans, application strategies, architectures and roadmaps;
- Evaluate technologies and conduct benchmarks for IT services, (e.g., enterprise content management, digital government, information management, strategic sourcing, data center services, architecture, and information security);
- Conduct IT assessments, portfolio analysis, technology evaluations, and IT capital planning to identify and recommend application rationalization, architecture, consolidation, modernization and retirement; and
- Develop and conduct technology reviews, concept projects, and training services to support IT application design, development, architecture, implementation and management services.

MINIMUM QUALIFICATIONS FOR CATEGORY 1

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) provided in Appendix A ([Required SOQ Forms](#)) describing:

1. Overall qualifications and experience in performing the services described in this Service Category; and
2. A minimum of three reference engagements with a combined total time of two (2) continuous years within the most recent three (3) years. Each referenced engagement **must** demonstrate the experience and qualifications in providing services with budgets of Two Hundred Fifty Thousand (\$250,000) or more to include a minimum of two (2) of the following four (4) areas:
 - a. Development of IT strategic plans, IT architectures and roadmaps that may include conducting assessments of current IT architectures to formulate recommendations, strategies and roadmaps.
 - b. Performing benchmarks for IT services, including service levels and costs.
 - c. Conducting technology evaluations and developing strategies, recommendations and roadmaps for at least one of the following areas: enterprise content management, portal and web content management, information management, training services, strategic sourcing and information security.
 - d. Performing IT assessment, portfolio analysis, and application modernization strategies.
3. For **each** referenced engagement or project, Vendor **must** on SOQ Form 2:
 - Describe the IT strategic plan, technology review, technology evaluation and/or benchmarks completed.

CATEGORY 2: PROJECT MANAGEMENT AND GOVERNANCE PLANNING SERVICES

This Service Category includes enterprise project management, change management, governance program, quality assurance, and independent validation and verification, training, risk management consulting services, based on industry standard practices, (e.g., Project Management Institute (PMI)), to:

- Develop and manage project plans and budgets;
- Manage resources required to execute project plans and complete its tasks and deliverables;
- Review and track completion of defined tasks and deliverables;
- Develop and implement IT governance programs;
- Develop and implement governance, quality assurance, independent validation and verification, and risk management plans for IT projects; and
- Manage and track resolution of project issues and risks.

MINIMUM QUALIFICATIONS FOR CATEGORY 2

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) provided in Appendix A ([Required SOQ Forms](#)) describing:

1. Overall qualifications and experience in performing the services described in this Service Category; and
2. A minimum of three reference engagements with a combined total time of two (2) continuous years within the most recent three (3) years. Each referenced engagement **must** demonstrate the experience and qualifications in providing services with budgets of Two Hundred Fifty Thousand (\$250,000) or more to include a minimum of two (2) of the following four (4) areas:
 - a. Certified (Project Management Institute or an accredited university) project managers who developed and managed IT projects.
 - b. Utilized standard IT Project Management Methodology, including "Work Breakdown Structures" and "GANNT" techniques in developing and managing project plans using Microsoft Project.
 - c. Developed and implemented IT governance programs with project governance plans.
 - d. Developed and implemented IT independent validation and verification (IV&V), quality assurance and risk management plans.
3. For **each** referenced engagement or project, Vendor **must** on SOQ Form 2:
 - Describe project plan structures, (IV&V) projects, quality assurance projects and/or risk management plans completed for enterprise projects.

CATEGORY 3: REQUIREMENTS ANALYSIS AND SOLICITATION DEVELOPMENT SERVICES

This Service Category includes consulting services to develop the business, functional and technical requirements, statements of work, change management, training, conduct fit-gap analysis, and develop acquisition recommendations and Request for Proposals (RFPs) for:

- System and data integration projects;
- Public sector applications and systems; and
- Application architecture, design and development using waterfall and/or agile development frameworks.

MINIMUM QUALIFICATIONS FOR CATEGORY 3

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) provided in Appendix A ([Required SOQ Forms](#)) describing:

1. Overall qualifications and experience in performing the services described in this Service Category; and
2. A minimum of three reference engagements with a combined total time of two (2) continuous years within the most recent three (3) years. Each referenced engagement **must** demonstrate the experience and qualifications in providing services with budgets of Two Hundred Fifty Thousand (\$250,000) or higher to include a minimum of two (2) of the four (4) of the following:
 - a. Conducted requirements analysis to develop functional and technical requirements, and Request for Proposals for IT projects.
 - b. Performed system evaluations and fit-gap analysis to develop acquisition strategies.
 - c. Performed quality assurance (QA) and independent validation and verification (IV&V) of RFP requirements, including functional and technical requirements and statements of work.
 - d. Developed business, functional and technical requirements, statements of work, and change management services.
3. For **each** referenced engagement or project, Vendor **must** on SOQ Form 2:
 - Explain functional and technical requirements, and Request for Proposals and fit-gap analysis projects; and/or
 - Describe project plan structures, (IV&V) projects, quality assurance projects and risk management plans completed for enterprise projects; and/or
 - Describe business, functional and technical requirements, statements of work, and change management projects completed.

CATEGORY 4: TECHNICAL CONSULTING SERVICES

This Service Category includes technical consulting services to support the planning, design, development, architecture, implementation and application management services for product and/or technology **solutions** described in the following Subcategories. Solutions may utilize cloud hosted and/or on-premises implementations. Vendors **must** individually qualify for **each** Subcategory:

- a. Enterprise Content Management, Analytics and Portal Services; examples include:
 - Documentum, OpenText Global 360, OpenText Content/Process Suite, and open source web content management, analytics and portal services.
- b. Electronic Forms, Workflow, Analytics and Portal Services; examples include:
 - Adobe, Nintex, Microsoft Flow/Forms, and Laserfiche electronic forms, workflow, analytics and portal services.
- c. Workplace Collaboration and Analytics Collaboration Services; examples include:
 - Microsoft Office 365, Analytics, Dynamics, Mobility and SharePoint collaboration services.
- d. Analytics, Business Intelligence, Visualization and Reporting Services; examples include:
 - IBM analytics, Cognos business intelligence, Information Server and reporting services, Microsoft Power BI, Tableau analytics, business intelligence and visualization services, and open source analytics, business intelligence and visualization services.
- e. Master Data and Identity Management Services; examples include:
 - IBM InfoSphere master data management services and Microsoft/Oracle enterprise identity management services.
- f. Geospatial Information Services; examples include:
 - ESRI ArcGIS geospatial information services.
- g. Infrastructure, Programming, Middleware and Operating System Services; examples include:
 - Red Hat middleware, cloud and Dev/Ops services, Oracle infrastructure, programming, middleware and OS services, IBM infrastructure, programming, middleware and OS services, and Hortonworks Hadoop ecosystem programming services.
- h. Financial, Materials, Personnel, Timekeeping, Payroll, Customer Relationship and Facility Services; examples include:
 - CGI Advantage business applications and integration services, Oracle business applications and integration services, IBM Maximo facilities management applications and integration services, IBM Tririga facilities management applications and integration services, Salesforce business applications and integration services.
- i. Document Workflow and Imaging Services; examples include:
 - Bulk back file conversion and capture services, Captiva/Kofax capture services, and Image workflow solution services.

CATEGORY 4: TECHNICAL CONSULTING SERVICES (CONTINUED)

- j. Commercial Cloud and DC1 Data Center Services, examples include:
 - Hybrid/Cloud architecture, configuration and migration services, cloud applications/infrastructure architecture, configuration and migration services, Security/Cyber architecture and configuration services, and Advanced Threat Analytics architecture and configuration services.
- k. Network, Application, Hardware and Systems Services, examples include:
 - Data center network services, wide area network (WAN) services, application architecture, configuration and migration services, hardware infrastructure configuration and migration services, and systems integration, operating systems and virtualization services.
- l. System Re-engineering Services, examples include:
 - a. Legacy application re-engineering, architecture, configuration and migration services, hardware infrastructure configuration and migration services, and systems integration, operating systems and virtualization services.
- m. Commercial/Government Cloud Managed Services, Software as a Service (SaaS), Platform as a Service (PaaS), Infrastructure as a Service (IaaS), and Database as a Service (DBaaS) Services, examples include:
 - Commercial/Government Cloud applications' architecture, configuration, migration services and managed services, Commercial/Government Cloud platforms' architecture, configuration, migration services and managed services, and Commercial/Government Cloud infrastructures' architecture, configuration, migration services and managed services.

MINIMUM QUALIFICATIONS FOR CATEGORY 4

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) provided in Appendix A ([Required SOQ Forms](#)) **for each Subcategory** stated above, (e.g., Category 4: Technical Consulting Services: 4a – Enterprise Content Management, Analytics and Portal Services), describing:

1. Overall qualifications and experience in performing the services described in this Service Category and Subcategory; and
2. A minimum of three reference engagements with a combined total time of two (2) continuous years within the most recent three (3) years. The referenced engagements **must** demonstrate the experience and qualifications in designing, developing and implementing solutions for an enterprise of at least fifty (50) users and a minimum Two Hundred Fifty Thousand (\$250,000) project budget using the technologies for the respective Subcategory.
3. For **each** referenced engagement or project in each Subcategory above, Vendor **must** describe on SOQ Form 2:
 - Explain the application, components and solution deployed for the technology in the subcategory;

CATEGORY 4: MINIMUM QUALIFICATIONS (CONTINUED)

- Any integration to other line of business systems performed; and
- The infrastructure deployed.

Note: Each 4x Subcategory above contain examples of the type of consulting services acquired under the Subcategory. The companion Microsoft Excel Matrix document will contain all of the Contractors qualified for consulting services under a specific 4x Subcategory.

A Contractor not qualified for a solicitation's specific product set that wishes to bid **must** submit with their bid a SOQ Form 2 with references for the product set along.

CATEGORY 5: INFORMATION SECURITY RISK, MITIGATION AND FORENSICS SERVICES

This Service Category includes Information Security Risk Assessments, Compliance and Breach Mitigation and Notification Services described in the following Subcategories. Vendors **must individually qualify** for **each** Subcategory:

- a. Information Security Risk Assessments and Compliance Services provides a means to conduct penetration testing; to identify and assess risks and vulnerabilities utilizing an information security industry standard framework/methodology including the ability to develop and formulate an information security strategy derived from the risk assessment; to assess information security program maturity; and determine compliance with federal and State legislations or regulations, County/departmental policies, standards, and procedures.
- b. Incident Response, Breach Mitigation and Notification Services provide various types of breach services (e.g., data breach notification management, call center communications management, digital forensics, credit/identity theft monitoring and protection services), in response to information security/privacy incidents where regulated data (e.g., Personally Identifiable Information (PII), Protected Health Information (PHI)) has been compromised.

Incident Response Services includes computer security incident response support, log analysis, forensics, advanced malware analysis, advanced threat actor response support, and advanced threat/incident remediation assistance.

- c. Computer Forensics, eDiscovery and Data Analytics Services provides specialized services performing forensic analysis, including internet history reporting, data deletion, search assessment, intellectual property theft, deleted file recovery and deleted message recovery.

Data analytics services should incorporate evaluation of data sets using advanced analytics and traditional searching methodologies to evaluate, cull, and defensibly identify and refine potentially relevant documents. Consulting and education services comprised of a review process, technology-assisted review, predictive coding technologies, and methodologies.

Other service areas included in this sub-category are data preservation and collection strategies, training, eDiscovery legal hold consulting services including electronically stored information (ESI) Identification, data preservation, collection of unstructured and structured data, and computer forensics analysis.

MINIMUM QUALIFICATIONS FOR CATEGORY 5

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) of Appendix A ([Required SOQ Forms](#)) for each Subcategory stated above, (e.g., Category 5: Information Security Risk, Mitigation and Forensics Services: 5a – Information Security Risk Assessments and Compliance Services), describing:

1. Overall qualifications and experience in performing the services described in this Service Category and Subcategory; and
2. A minimum of three reference engagements with a combined total time of one (1) continuous year within the most recent two (2) years. The referenced engagements must demonstrate the experience and qualifications in designing, developing and implementing solutions for an enterprise of at least ten thousand (10,000) end points and a minimum One Hundred Thousand (\$100,000) project budget using the technologies for the respective Subcategory.

CATEGORY 5: MINIMUM QUALIFICATIONS (CONTINUED)

3. For **each** referenced engagement or project in **each Subcategory**, Vendor **must** on SOQ Form 2:
 - Describe the Information Security Risk Assessments and Compliance Services;
 - Describe the Incident Response, Breach Mitigation and Notification Services; and/or
 - Describe the Computer Forensics, eDiscovery and Data Analytics Services conducted.

CATEGORY 6: INFORMATION MANAGEMENT AND IT TRANSFORMATION SERVICES

This service category includes consulting services for the planning and implementation of enterprise programs, platforms, architectures, applications and/or **solutions** using modern technology and techniques described in the following Subcategories. Vendors **must** individually qualify for **each** Subcategory:

- a. Develop enterprise information management, technologies and security strategies, architectures and roadmaps
- b. Develop and implement enterprise data management solutions including:
 - Data governance planning and implementation
 - Information asset management and data catalog development
 - Data profiling and data quality assessment
 - Master Data Management planning and implementation
- c. Develop enterprise data integration strategies and implementation including:
 - Development of enterprise data standards and models
 - Data integration analysis and architecture development
 - Development and implementation of ETL (Extract, Transform, Load) strategies
 - Data as a Service architecture planning and Enterprise Service Bus modeling
- d. Develop enterprise data store platform architecture and strategies including:
 - Data warehouse or data lake architecture design and implementation
 - Big Data technologies platform architecture design and implementation
 - Hadoop and Spark ecosystem design and implementation
- e. Develop and implement enterprise data analytics solutions including:
 - Entity and location analytics
 - Link analysis and social media analytics
 - Statistical analysis, data sciences and machine learning technologies
 - Big Data and analytics design, development and deployment
- f. Develop enterprise IT Transformation strategies and implementation including:
 - Platform as a service, DevOps, automation and container design and implementation
 - Open source, cloud native and mobile applications development and deployment
 - Extreme Agile development, pair programming design and implementation
 - Continuous integration/deployment (CI/CD) and test-driven development services (TDD)

MINIMUM QUALIFICATIONS FOR CATEGORY 6

To qualify for this Service Category, interested Vendors **must** submit a Vendor Qualifications ([SOQ Form 2](#)) of Appendix A ([Required SOQ Forms](#)) for each Subcategory stated above, (e.g., Category 6: Information Management and IT Transformation Services: 6a – Management, Technologies and Security Strategies, Architectures and Roadmaps), describing:

CATEGORY 6: MINIMUM QUALIFICATIONS (CONTINUED)

1. Overall qualifications and experience in performing the services described in this Service Category and Subcategory; and
2. A minimum of three reference engagements with a combined total time of one (1) continuous year within the most recent two (2) years. The referenced engagements **must** demonstrate the experience and qualifications in designing, developing and implementing solutions for an enterprise of at least 50 users and a minimum \$250,000 project budget using the technologies for the respective Subcategory.
3. For **each** referenced engagement or project in **each Subcategory**, Vendor **must** on SOQ Form 2:
 - Describe the application, components and solution deployed for the technology in the subcategory;
 - Describe any integration to other line of business systems performed; and
 - Describe the infrastructure deployed.

SAMPLE WORK ORDER SOLICITATION**ESMA Work Order Solicitation Number:** _____**Project Name:** _____**Soliciting County Department:** _____**ESMA Service Category/Subcategory:** _____**Type of Work Order:**

- ☐ Fixed Price per Deliverable (FP/D)
☐ Time and Materials per Deliverable (T&M/D)
☐ Both FP/D and T&M/D

Ownership of Deliverables:

- ☐ Deliverables are Joint IP
☐ Deliverables are County IP

(The foregoing determination is based on the Department's understanding of the Deliverables being provided by Contractor. The final determination regarding the ownership of Deliverables will be as set forth in the executed Work Order.)

Purpose/Objective for this Work Order:

(This Section will contain a general description of the project for which this Work Order is being solicited and what this Work Order is intended to accomplish)

Scope of Services Being Requested:

(This Section will contain a general description of the services that are being requested under this Work Order)

Work Order Deliverables:

(This Section will contain a brief list of the Work Order Deliverables. A more detailed description of the specific tasks, deliverables and acceptance criteria will be found in the Statement of Work (SOW) that will be attached to this Work Order Solicitation – Refer to Exhibit B of the ESMA to see a Sample SOW)

Additional Minimum Requirements, if any, or Other Qualifying Information:

(This Section will describe any specialized minimum requirements or other qualifying information, if any, the proposed candidates must have in order to be considered under this solicitation)

Evaluation Criteria Being Applied:

(This Section will specify the Criteria that will be used in evaluating the solicitation responses, together with the percentage of weight that will be applied to each evaluation criterion. Where evaluation criteria include anything other than cost, each Department will include specific information regarding how each of the following evaluation criteria will be applied in each Work Order Solicitation. With respect to Cost, the maximum number of points will be awarded to the lowest cost proposal, with all other proposals compared the lowest cost and points awarded accordingly.)

Selection Process:

Evaluation of the proposals will be made by an Evaluation Committee selected by the Department. The Committee will evaluate the proposals and will use the evaluation approach described herein to select a prospective Contractor. All proposals will be evaluated based on the criteria listed herein. All proposals will

be scored and ranked in numerical sequence from high to low. The County may also, at its option, invite proposers being evaluated to make a verbal presentation or conduct site visits, if appropriate. The Evaluation Committee may utilize the services of appropriate experts to assist in this evaluation.

The County retains the right to select a proposal other than the proposal receiving the highest number of points if County determines, in its sole discretion, another proposal is the most overall qualified, cost-effective, responsive, responsible and in the best interests of the County.

Disqualification of Work Order Solicitation Proposal:

A Work Order Solicitation proposal may be disqualified from consideration because a Department and/or ISD determined it was non-responsive at any time during the review/evaluation process. If a Department and/or ISD determine that a proposal is disqualified due to non-responsiveness, the ESMA Administrator will notify the proposer in writing. Upon receipt of the written determination of non-responsiveness, the proposer may submit a written request for a Disqualification Review within the timeframe specified in the written determination.

A request for a Disqualification Review may, in the ISD's sole discretion, be denied if the request does not satisfy all of the following criteria: (a) The person or entity requesting a Disqualification Review is the Proposer; (b) The request for a Disqualification Review is submitted timely (i.e., by the date and time specified in the written determination); and (c) The request for a Disqualification Review asserts that the Department's and/or ISD's determination of disqualification due to non-responsiveness was erroneous (e.g. factual errors, etc.) and provides factual support on each ground asserted as well as copies of all documents and other material that support the assertions. The Disqualification Review will be completed and the determination will be provided to the requesting proposer, in writing, prior to the conclusion of the evaluation process.

Solicitation Response Filing Instructions:

(This Section will contain specific information regarding what forms and supporting documentation is being required, as well as the date and time for filing Solicitation Responses).

Filing Location:

Work Order Solicitation Responses (WOSR) must be filed as follows:

- An electronic copy in PDF format submitted via email to the ESMA Administrator (esma.contracts@isd.lacounty.gov) with "WORK ORDER SOLICITATION RESPONSE FOR ESMA WORK ORDER # _____" in the subject line of the email and the body of the email must contain the name and address of the Qualified Contractor.

SEE SEPARATE ATTACHED FILE:

ITS-I10604-S_ESMA_Appendix_D_Sample_MA_and_Exhibits

TRANSMITTAL TO REQUEST A SOLICITATION REQUIREMENT REVIEW

A Solicitation Requirements Review must be received by the County within ten (10) business days of issuance of the solicitation document

Vendor Name:	Date of Request:
Project Title:	Project No.

A **Solicitation Requirements Review** is being requested because the Vendor asserts that they are being unfairly disadvantaged for the following reason(s): *(check all that apply)*

- ☐ Application of **Minimum Requirements**
- ☐ Application of **Business Requirements**
- ☐ Due to **unclear instructions** - may result in the County not receiving the best possible responses

I understand that this request must be received by the County within **(ten) 10 business days** of issuance of the solicitation document.

*Attach supporting documentation describing each area contested: Vendor must **explain in detail** the factual reasons for the requested review.*

Request submitted by:

(Name)

(Title)

For County Use Only	
Date of ESMA solicitation: _____	Date Request received: _____
	Date Response sent: _____
Results of County review:	

ESMA EXECUTION REQUIRED FORMS

[EXHIBIT D](#): CONTRACTOR'S ADMINISTRATION

[PAGE 63](#): AUTHORIZATION OF THE ESMA SIGNATURES PAGE

CONTRACTOR'S ADMINISTRATION

CONTRACTOR NAME (AS IT APPEARS ON STATE FILED DOCUMENT)

SIGNATURE (BY AUTHORIZED OFFICIAL – SEE 14.3 BELOW)

DATE

PRINT NAME**MASTER AGREEMENT PARAGRAPH:****14.1 CONTRACTOR'S PROJECT DIRECTOR (A) AND DESIGNEE (B):**

(RESPONSIBLE FOR CONTRACTOR'S ADMINISTRATION OF THIS MASTER AGREEMENT AND MUST COORDINATE WITH COUNTY'S ESMA ADMINISTRATOR, OR HIS OR HER DESIGNEE, WITH RESPECT TO ALL ADMINISTRATIVE MATTERS)

A. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

B. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

14.2 CONTRACTOR'S PROJECT MANAGER (A) AND DESIGNEE (B):

(RESPONSIBLE FOR CONTRACTOR'S DAY-TO-DAY ACTIVITIES AS RELATED TO THIS MASTER AGREEMENT AND MUST COORDINATE WITH COUNTY'S WORK ORDER PROJECT MANAGERS ON A REGULAR BASIS WITH RESPECT TO ALL ACTIVE WORK ORDERS)

A. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

B. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

14.3 CONTRACTOR'S AUTHORIZED OFFICIAL (A) AND DESIGNEE (B):

(CONTRACTOR REPRESENTS AND WARRANTS THAT ALL REQUIREMENTS OF CONTRACTOR HAVE BEEN FULFILLED TO PROVIDE ACTUAL AUTHORITY TO SUCH OFFICIALS TO EXECUTE DOCUMENTS UNDER THIS MASTER AGREEMENT ON BEHALF OF CONTRACTOR)

A. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

B. Name: _____
Title: _____
Address: _____

Telephone: _____
Facsimile: _____
E-Mail ID: _____

CONTRACTOR'S ADMINISTRATION (CONTINUED)**PRINT CONTRACTOR NAME** (AS IT APPEARS ON STATE FILED DOCUMENT)**43.0 NOTICES TO CONTRACTOR WILL BE SENT TO THE FOLLOWING ADDRESS:**

(ALL NOTICES OR DEMANDS REQUIRED OR PERMITTED TO BE GIVEN OR MADE UNDER THIS MASTER AGREEMENT)

Address: _____

Facsimile: _____

E-Mail ID: _____

The Responses To Items #1 Through #6 Below Are Required For Informational Purposes Only.

1. If your firm is a corporation; enter state filed (legal) name (found on the Articles of Incorporation) and the state where Incorporated:

Name: _____

State: _____

2. Is your firm a partnership? Yes ☐ No ☐ or, a sole proprietorship? Yes ☐ No ☐

If yes, enter the name of the proprietor or managing partner:

3. Is your firm doing business under one or more DBA's? Yes ☐ No ☐

If yes, please list all DBA's and the County(s) of registration:NameCounty of Registration

4. Is your firm wholly or majority owned by, or a subsidiary of, another firm? Yes ☐ No ☐

If yes, please enter;

Name of parent firm: _____

State of incorporation or registration of parent firm: _____

5. Please provide office facsimile number: _____

6. Please provide office E-Mail address: _____

**AUTHORIZATION OF THE ENTERPRISE SERVICES
MASTER AGREEMENT (ESMA)**

IN WITNESS WHEREOF, the Board of Supervisors of the County of Los Angeles has caused this Agreement to be executed by the County's Director, Internal Services Department or his or her designee, and approved by County Counsel, and Contractor has caused this Agreement to be executed in its behalf by its duly authorized officer.

By: _____
CONTRACTOR

SIGNED: _____

PRINTED: _____

TITLE: _____

COUNTY OF LOS ANGELES

By: _____
SELWYN HOLLINS
DIRECTOR
INTERNAL SERVICES DEPARTMENT

DATE: _____

APPROVED AS TO FORM:

DAWYN R. HARRISON
INTERIM COUNTY COUNSEL

By: _____
DEPUTY COUNTY COUNSEL