

## WORK ORDER REQUEST FORM (WORF)

<b>WORF #:</b>	(# Prefix will be either <b>ISD</b> or <b>SRO</b> , as appropriate) (PM Fill-in)
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**Part I**  
**(To Be Filled-in by AOC)**

<b>1. Position Classification:</b>	(PM Fill-in)		
<b>2. Project:</b>	(PM Fill-in)		
<b>3. Maximum Hourly Rate:</b>	(PM Fill-in)		
<b>4. Annual Dollar Range:</b>	(PM Fill-in)		
<b>5. Designated Home Base:</b>	(PM Fill-in)		
<b>6. Travel</b>	<b>Will Travel of Key Personnel away from Home Base will be required to perform the Work of the Work Order</b>	Yes / No (PM Mark as Appropriate)	
	<b>Estimated Percentage of Time Key Personnel will be Required to Travel:</b>	(PM Enter Percentage)	
	<b>Estimated Amount for Reimbursable Travel for WO Initial Term:</b>	(PM Fill-in Amount)	
<b>7. After-Hours Maintenance &amp; Support</b>	<b>Will After-Hours Maintenance &amp; Support be required to perform the Work of the Work Order:</b>	May be required / Will not be Required (PM Mark as Appropriate)	
	<b>If After-Hours Maintenance &amp; Support may be Required, Estimated Amount for Initial Fiscal Year:</b>	(PM Fill-in Amount)	
<b>8. Duration of Assignment:</b>	<b>Term of the Work Order (including any Work Order Option Terms):</b>		<b>Maximum Hours Per Term</b>
	<b>WO Initial Term (including start date):</b>	(PM Insert From / To Dates)	(PM Fill-in)
	<b>WO 1st Option Term: (if any)</b>	(PM Insert From / To Dates)	(PM Fill-in)
	<b>WO 2nd Option Term: (if any)</b>	(PM Insert From / To Dates)	(PM Fill-in)
	<b>(Insert additional Option Terms as may be required)</b>	(PM Insert From / To Dates)	(PM Fill-in)
<b>9. Maximum number of Candidates the Proposer may propose for this WORF:</b>	(PM Mark as Appropriate)		

RFP Number: ISD-201002-CT

Project Title: Master Agreements for Technical Staff Augmentation Services

Attachment D-2, Work Order Request Form

<b>10. Clarification of WORF:</b>	<b>Due Date and Time for Clarifying Questions to be Submitted to:</b> <a href="mailto:Solicitations@jud.ca.gov">Solicitations@jud.ca.gov</a>	(PM Insert Date and Time)
	<b>Date AOC will e-mail responses of clarifying questions to prospective proposers:</b>	(PM Insert Date )
<b>11. Hardcopy WORF Proposal Due Date and Time :</b>		(PM Insert Date and Time)
<b>12. Deliver Hardcopy Proposal to:</b>		<b>Judicial Council of California</b> <b>Administrative Office of the Courts</b> <b>Attn: Nadine McFadden</b> <b>WORF # _____</b> <b>455 Golden Gate Avenue, 7th Floor</b> <b>San Francisco, CA 94102</b>
<b>13. Interview of Top-Rank Candidates to Clarify Proposal:</b>	<b>Interview Window Timeframe for Top-Rated Candidates:</b>	(PM Insert Date Range)
	<b>Interview Location:</b>	(PM Insert Location)
<b>14. Minimum Job-Specific Skills/Qualifications Required:</b>		(PM Fill-in)
<b>15. Additional Skills/Qualifications Desired:</b> (PM Fill-in)		
<b>16. Evaluation Criteria for this WORF</b>		
Criteria	Description	Points (Possible Out of 100)
A. Specialized expertise and technical competence	Proposals will be evaluated based on the proposer's demonstrated ability to meet the required/desired qualifications for the applicable position	(PM Fill-in)
B. Past record of performance	Proposals will be evaluated considering candidate's past performance on projects of similar scope and duration	(PM Fill-in)
C. Ability to meet requirements of the project	Proposals will be evaluated in terms of compliance with proposed project scheduling	(PM Fill-in)
D. Reasonableness of cost projections	Proposals will be evaluated in terms of reasonableness of cost, proposed rate structure for the position, including breakdown of salary, overhead and profit	(PM Fill-in)
<i>[PM add lines for additional criteria as may be necessary]</i>		

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**17. Tasks and Responsibilities to be Performed (PM Fill-in)**

Task No.	Description of Tasks and Responsibilities
1	<i>[Describe in detail all Tasks and responsibilities the Key Personnel is required to perform under this Work Order. Add additional lines as necessary.]</i>
<i>[Add Task Nos. as appropriate]</i>	<i>[The Tasks and responsibilities for most staff augmentation requirements should not change over the life of any particular Work Order unless the work of the Work Order has distinct phases. If distinct phases are planned, they need to be identified at the time of the WORF, and the varying tasks and responsibilities for each phase should be detailed including tasks and responsibilities for option terms if the tasks and responsibilities change from the initial term.]</i>

**18. Deliverables To Be Provided for WO Initial Term (PM Fill-in)**

Term	No.	Description of Deliverable	Due Date	Hours
WO Initial Term	1	<i>[Provide description of each Deliverable]</i>		
WO Initial Term	2			
WO Initial Term	3			
WO Initial Term	4			
WO Initial Term	5			
WO Initial Term	6			
WO Initial Term	7			
WO Initial Term	8			
WO Initial Term	9			
WO Initial Term	10			
WO Initial Term	11			
WO Initial Term	12	<i>[Do Not insert a "Total" line]</i>		

**19. Deliverables To Be Provided for 1st Option Term (PM Fill-in)**

Term	No.	Description of Deliverable	Due Date	Hours
WO 1st Option Term	13	<i>[Provide description of each Deliverable]</i>		
WO 1st Option Term	14			
WO 1st Option Term	15			
WO 1st Option Term	16			

RFP Number: ISD-201002-CT

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Attachment D-2, Work Order Request Form

Term	No.	Description of Deliverable	Due Date	Hours
WO 1st Option Term	17			
WO 1st Option Term	18			
WO 1st Option Term	19			
WO 1st Option Term	20			
WO 1st Option Term	21			
WO 1st Option Term	22			
WO 1st Option Term	23			
WO 1st Option Term	24	<b>[Do Not insert a "Total" line]</b>		

**20. Deliverables To Be Provided for 2nd Option Term (PM Fill-in)**

Term	No.	Description of Deliverable	Due Date	Hours
WO 2nd Option Term	25	<b>[Provide description of each Deliverable]</b>		
WO 2nd Option Term	26			
WO 2nd Option Term	27			
WO 2nd Option Term	28			
WO 2nd Option Term	29			
WO 2nd Option Term	30			
WO 2nd Option Term	31			
WO 2nd Option Term	32			
WO 2nd Option Term	33			
WO 2nd Option Term	34			
WO 2nd Option Term	35			
WO 2nd Option Term	36	<b>[Do Not insert a "Total" line]</b>		

**21. Additional Requirements:**

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End of Part I

**Part II**

**(To Be Filled-in by Proposer)**

**\*\*Proposer shall submit separate completed and signed Part II's for each proposed Candidate\*\***

<b>Proposer Name:</b>	(Proposer Fill-in)
<b>Master Agreement #:</b>	(Proposer Fill-in)

<b>Candidate's Name:</b>	(Proposer Fill-in)
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**1. Specialized Expertise and Technical Competence**

<p>A. Minimum required job-specific skills/qualifications: (Provide a statement that demonstrates how the Candidate meets each of the minimum required job-specific skills/qualifications specified in Part I. If selected for an interview, Candidate may be required to demonstrate proficiency in the minimum required job-specific skills/qualifications, including oral and written communication skills at both a technical and non-technical level.)</p>
<p>B. Desired job-specific skills/qualifications: (Provide a statement that demonstrates how the Candidate meets the desired job-specific skills/qualifications specified in Part I. If selected for an interview, Candidate may be required to demonstrate proficiency in any claimed job-specific skill/qualification.)</p>
<p>C. Candidate's Resume: (Provide the Candidate's resume (in unprotected Word format.)</p>

**2. Record of Past Performance**

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

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

**Reference #1**

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

**Reference #2**

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

**Reference #3**

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

**3. Ability to Meet Requirements of the Project**

A. Date Candidate is available to start: (Proposer Fill-in Date)

B. Candidate availability for the duration of the Project including WO Initial Term and all WO Option Terms: (Proposer to include a statement of proposed Candidate's availability during the WO Initial Term and all WO Option Terms for the Project, including the ability to fulfill the hours specified in Sections 18, 19 and 20 of the WOF Part I. The statement must include a disclosure of any other AOC or non-AOC contracts for work which the proposed Candidate is obligated to fulfill and identify the dates or conditions which result in periods of unavailability. The statement must also include any other anticipated periods of unavailability greater than five (5) consecutive business days during the WO Initial Term. If there are no periods of unavailability, then it must be stated so.)

C. Candidate's ability to complete the Work: (Proposer to include a statement of the proposed Candidate's ability to complete the work within the project schedule set forth in Part I.)

D. Candidate's local presence to Home Base: (Proposer to include a statement of Candidate's place of residence during the Initial Term and all Option Terms.)

E. Candidate's right to work for the duration of the Project including WO Initial Term and all WO Option Terms: (Proposer to include a statement regarding Candidate's citizenship, legal right to work in the United States, including type of visa, if any, and the visa's expiration date.)

**4. Reasonableness of Cost Projections**

A. Is candidate an employee/independent contractor of Proposer? Fill-in “Yes” or “No” in the box at right. If answer is “Yes” fill-in Table 1 only (do not fill-in Table 2). If answer is “No” go to question #B, below, and do not fill-in Table 1.	Yes / No
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**Table 1 (Proposer Fill-in)**

Use this Table 1 only when Candidate is an employee/independent contractor of Proposer							
		WO Initial Term		WO 1st Option Term		WO 2nd Option Term	
		Amount	Percent	Amount	Percent	Amount	Percent
Hourly Amount Payable to Key Personnel Candidate							
Hourly Amount Allocated to Proposer’s Overhead *	+						
Hourly Amount Allocated to Proposer’s Profit*	+						
Fully Burdened Hourly Rate for Key Personnel Candidate	=		100%		100%		100%

\*Mark-up rates cannot exceed the overhead and/or profit mark-up rates set forth in the Master Agreement.

B. If candidate is NOT an employee/independent contractor of Proposer, but is being made available by a company / firm subcontracted by Proposer, indicate name of the subcontracted company / firm and fill-in Table 2 only (do not fill-in Table 1).	(Proposer Fill-in subcontracted company / firm’s name)
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**Table 2 (Proposer Fill-in)**

Use this Table 2 only when Candidate is an employee/independent contractor of a company/firm subcontracted to Proposer							
		WO Initial Term		WO 1st Option Term		WO 2nd Option Term	
		Amount	Percent	Amount	Percent	Amount	Percent
Hourly Amount Payable to Key Personnel Candidate							
Hourly Amount Allocated to Subcontractor’s Markup*	+						
Fully Burdened Hourly Rate for Key Personnel Candidate	=		100%		100%		100%

\*Mark-up rate cannot exceed the Subcontractor mark-up rate set forth in the Master Agreement.




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**5. Proposer's Signature**

<b>Proposer's Name:</b>	<i>(Proposer Fill-in)</i>
<b>Master Agreement #:</b>	<i>(Proposer Fill-in)</i>
<b>WORF #:</b>	
<b>Authorized Signature:</b>	
<b>Printed Name and Title of Person Signing</b>	<i>(Proposer Fill-in)</i>
<b>Date:</b>	<i>(Proposer Fill-in)</i>
<b>Proposer's Address:</b>	<i>(Proposer Fill-in)</i>

*End of Work Order Request Form*

SAMPLE