

ATTACHMENT 16: KEY STAFF QUALIFICATIONS FORM - INSTRUCTIONS

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The Bidder must complete and submit a separate Key Staff Qualification Form (Attachment 16) for each cited project used by each key staff member to meet mandatory qualifications or experience and, if applicable, desirable qualifications as required for this project. Each Key Staff Qualification Form must have a corresponding ATTACHMENT 17: KEY STAFF REFERENCE FORM submitted. For example, if the Bidder submits three (3) Key Staff Qualification Forms for the Project Manager, then three (3) corresponding ATTACHMENT 17: KEY STAFF REFERENCE FORM for the Project Manager must be submitted with their Phase 2 Proposal response.

The Key Staff Qualification Form (Attachment 16) will be used by the State to evaluate Key Staff qualifications. The Bidder must specify the required experience in the pertinent row for each requirement in the Key Staff Qualification Form.

No more than five (5) Key Staff Qualifications Forms citing one (1) project on each form and five (5) corresponding ATTACHMENT 17: KEY STAFF REFERENCE FORM are permitted for each proposed key staff role to confirm the Key Staff role possesses the experience to meet each of the mandatory qualification specified. Any given project cited may meet multiple qualifications. If more than five (5) Key Staff Qualifications Forms are submitted, only the first five (5) in the order presented in the proposal will be evaluated.

For the purposes and context of the Key Staff qualifications forms and reference forms only, the term "Project" is defined as an individual effort or contract where the key staff played a role on the cited contract.

The Bidder must complete each Key Staff Qualifications Form (Attachment 16) in accordance with the instructions provided below:

- All dates must be in MM/DD/YYYY format.
- Adhere to [SECTION 3.3.5. FULL-TIME/PART-TIME MONTH EQUIVALENTS DEFINITION](#) for computing eligible full-time and part-time experience.
- For desirable qualifications, partial year experience will be rounded down. For example, two and a half (2.5) years would be rounded down to two (2) years.
- Large-scale is defined as a project that is extensive in scope and complexity with over 1,000 end users. It typically involves a high level of resources, including a significant budget and a large team of professionals. These projects often span multiple years and may involve multiple departments and organizations.

- A complex IT project is defined as an information technology initiative that involves multiple separate, but interconnected components and requires a high level of technical expertise to execute. These projects often involve the development, implementation, or upgrade of software systems, hardware infrastructure, or network architectures.
- Completed implementation is defined as a solution that has received system acceptance from the customer and is in a production environment.
- All experience cited must have occurred in the United States of America within the last ten (10) years, **unless otherwise stated**, by the Phase 1 Proposal response due date.

Contact person for Bidder's References — Prior to the Bidder using a current SWRCB State employee as a Bidder reference, the Bidder shall contact the State Procurement Officer identified in [SECTION 2.2.1. PROCUREMENT OFFICER](#), to ensure the current State employee is not a member of the Evaluation Team or a State Water Resources Control Board, Division of Drinking Water State employee or Contractor. In addition, only one (1) reference from the California State Water Resources Control Board (SWRCB) is permitted for this solicitation.

Box 1, Bidder: Provide the company name of the Bidder submitting the proposal.

Box 2, Key Staff Name: Provide the name of the Bidder's proposed key staff.

Box 3, Staff's Referenced Project Name: Provide the name of the qualifying project in which the proposed key staff gained experience to meet the qualification(s).

Box 4, Company Name (of staff's reference): Identify the company or government agency for whom the project was completed.

Box 5, Contact Name, Email Address and Telephone Number (of Staff's Reference): Identify the contact information from whom the project was completed. Enter the name, title, e-mail address and phone number for the reference contact for the project. By submitting a Phase 2 Proposal, the Bidder declares that the reference person identified is/was employed by the company identified in Box 4. The reference must be the same person identified in the Key Staff Reference Form (Attachment 16).

References must meet the following criteria:

- Must be from the company (customer) or the Agency for which the project was developed and/or services provided.
- Must be someone who performs a management or supervisory role on the referenced project.
- Must be external to the Bidder's organization and corporate structure.
- Must not be from employees or individuals who have or are currently working for the Bidder.
- Must not be a current State employee who is a member of the Evaluation Team, a State Water Resources Control Board, Division of Drinking Water State employee, a State Water Resources Control Board, Division of Information Technology State employee, or Contractor.

January 14, 2026

- A contract and all amendments to it are considered as one (1) project. Amendments to a contract cannot be submitted as separate projects.
- Must be able to provide an objective evaluation of the proposed Key Staff's performance.

Boxes 6 and 7, Staff Start Date and End Date: Provide the start and end dates the key staff worked on the cited project using MM/DD/YYYY format.

- All experience must have occurred within the last ten (10) years prior to the Phase 1 Proposal due date, unless stated otherwise.
- For cited projects that are currently ongoing, the cited project or experience will be calculated only for the work performed up to the Phase 1 Proposal due date. Please reference [SECTION 2.3. KEY ACTION DATES](#).

Box 8, Staff Work Schedule: Check the appropriate box for time proposed staff worked on the cited project. Refer to [SECTION 3.3.5. FULL-TIME/PART-TIME MONTH EQUIVALENTS DEFINITION](#) for additional details on calculating experience.

Box 9, Project Description: Provide a brief description of the nature of the proposed key staff's cited project.

Box 10, Contract Amount: Provide the dollar amount of the contract value in US dollars.

Box 11, Documenting instructions when a minimum number of years of experience is required:

Instructions for documenting the years of experience gained from the project cited by checking "Yes", "Partial", or "No". If "Partial" or "Yes" is checked, enter the years and/or months of "Experience gained on this referenced project" and describe the Key Staff's role and responsibilities performed on the project in the "Description of services provided" field. The Bidder must ensure that each description clearly addresses how the work performed on the project meets each of the minimum qualification components of the Mandatory Experience Requirement, as defined in each of the requirements.

Note: It is the Bidder's responsibility to ensure that each mandatory qualification is met in full and is addressed in the Key Staff qualification forms in order for the State to determine compliance with the requirements. If the State cannot determine that the years of experience for each of the mandatory qualifications have been met, Bidder's proposal may be deemed non-responsive.