ATTACHMENT 5 - BIDDER INFORMATION QUESTIONNAIRE
Solicitation Specific Questions

Bidder Name:	Salmon Group, Inc.

Instructions: Complete all questions below. Questions may have a drop-down menu from which to select your response.

QUALITY CONTROL AND ASSURANCE PROCEDURES
NOTE: Please enter "N/A" for any questions that are not applicable to the Lots being bid.

#	Question	Response
1	What is your firm's selection, screening and hiring processes for temporary workers.	Team SGI fully understands the critical nature of providing qualified candidates as tasked under awarded RFQs issued under the NYS OGS Group 73003-Administrative Services - Temporary Personnel (Statewide) Centralized Backdrop Contract. We will implement our proven recruiting processes that have facilitated the selection, screening, recruitment, and retention of qualified, cleared/uncleared, skilled personnel at locations across the U.S. , to ensure that this requirement is optimally staffed. Our Team's Candidate Databases, managed by the HR Department operating from within this contract's Program Management Office (PMO), provide more than 600 qualified personnel meeting and exceeding the skills, qualifications, and abilities detailed in this RFQ's Attachment 10. Team SGI has full-time, in-house recruiters specializing in administrative, financial, and technical staffing on a fast-turnaround schedule and in response to issued Task Orders. The efforts of this pool of recruiters, coupled with our proven recruitment tools, are invaluable in identifying temporary staff with the appropriate skills, ability to secure successful background investigation results, experience, and training to successfully execute any NYS OGS Group 73003-Administrative Services support requirement. Team SGI provides a comprehensive benefit and compensation package combined with education and training opportunities to develop new skills and abilities and maintain the currency of both technical and management certifications.
2	What are your testing, training and orientation programs for temporary workers?	Team SGI is committed to serving NYS OGS with the most highly skilled, culture driven, professional workforce for the RFQs issued under this NYS OGS Group 73003-Administrative Services - Temporary Personnel (Statewide) Centralized Backdrop Contract. We have developed both initial training and continuing education programs for our staff to ensure this. We will fully train all staff assigned to the RFQs awarded under this Centralized Backdrop Contract on all relevant topics including overall program orientation, specific RFQ task order orientation, corporate ethics/OCI/NDA, security awareness, automation protocols, and terrorism/counterintelligence issues.The first component of our training plan is the New Hire Orientation program that is contract specific but generally includes security training and requirements familiarization, position and contract responsibilities, operating and maintenance procedures, acquisition and other technical training opportunities and requirements, security and access control procedures to be completed as applicable, employee safety training, emergency procedures, and other topics unique to each RFQ contract. All staff have access to career online training programs and certification and licensing requirements and portals and will receive training via WebEx and Skype to facilitate their participation no matter where they are located. Team SGI also has a tuition reimbursement program that is part of our employee benefits package. This allows all temporary employees the opportunity to gain and continue to stay current with their technical knowledge, professional certifications, licenses, and industry trends. Standard college tuition reimbursement is also available for job-related courses and business/professional development classes. **Quality Control Education and Training:** As part of our ongoing training program, all personnel are made familiar with each RFQ contract's requirements and the corresponding standards, including all applicable local, state, and Federal laws, rules, and regulations. Personnel will realize how their assigned duties support the overall scope of the contract and efforts of other project personnel. At least monthly, Team SGI's QC Manager (QCM) meets with all RFQ task support staff to discuss quality control and project performance issues. These meetings occur after hours and may also be conducted by conference call or Skype Business calling. Quality control training includes how to perform self-inspections, as well as the role of Task-Level and Corporate-Level Inspections. Documenting defective performance and implementing corrective actions is also covered, as well as documenting and responding to customer comments, concerns, and complaints.
3	What type of background checks do you conduct for screening temporary workers (nature of the checks, kinds of records reviewed, number of years covered by the background check, etc.)?	As a Top-Secret cleared facility, we conduct criminal background checks and drug screenings on **all** new hires. Results of tests and assessments are carefully evaluated against customer criteria. Once an applicant has been screened, interviewed, tested, referenced, and is eligible for hire, the applicant is then eligible to be matched and assigned to a particular Work Request or RFQ requirement. Understanding how critical it is to have new hires or incumbents assessed and cleared for work as quickly as possible, our HR and Recruiting staff ensure that all candidates complete the required forms and paperwork accurately, completely, and on time. We perform preliminary checks of contact information and names included in their forms to ensure accuracy and consistency of information and access to the references to facilitate the security processes for badging and network access. This approach has fared very well in shortening the time it takes to get a new hire completely cleared to begin work.

4	Do you agree to perform the background checks as identified in the Solicitation as requested?	Yes we do.
5	How do you track individual resource performance? How does your firm reward good job performance by your temporary workers? Conversely, what types of disciplinary action does your firm use?	Team SGI places great importance on metrics and using these to continuously improve individual and corporate performance. We maintain a Corporate Scorecard with specific personnel, financial, and quality goals, which are updated quarterly and shared with staff. Due to this culture of metric-based performance management, our Team embraces managing to quantitative metrics on each client engagement, as distinct from managing to less precise qualitative measures. As part of our program management methodology, our Team develops a Quality Control Plan (QCP) that defines how we manage all quality levels. Our QCPs for our contracts define how we track, manage, and achieve metrics at both the program and task levels, as applicable. Program-level metrics are a balanced set of performance metrics to be achieved on a bi-annual basis across the program. These metrics are measured and reported on a quarterly basis and jointly reviewed bi-annually for revision (if necessary). General task metrics are defined in the master quality plan, and any additional metrics will be defined in the Task plan that we will submit for each specific task. When Team SGI establishes baseline performance standards, we also set threshold values, which are inside the acceptable level of quality delivery but provide indicators and warnings for our management. Our metrics-based approach to QA is designed to identify areas where potential problems may occur before they impact performance. In this way, we are able to intervene and take management action to correct the issue immediately before service falls below the established Acceptable Quality Levels (AQLs). These processes are developed from best practices, experience, and lessons learned from both SGI's and 2bFocused's programs. This process also includes the ongoing identification and approval of additional quality standards and AQLs, as applicable. Features of our Retention Plan and how we reward good job performance include: • Competitive salaries and fringe benefits using a combination of web-based research and historical corporate recruiting research to ensure that we remain competitive in salaries and benefits. • Incentive bonus programs that reward individual contribution over a long period. • Spot bonuses that reward individual contribution immediately and at any time contribution is noticed. • Corporate cultures that nurture employees to excel in their chosen field and solicit ideas and suggestions for improvement and innovation. • Training Opportunities to maintain professional qualifications and certifications. • Upward mobility within employees' career paths. • Opportunities to cross-train into new career paths for sustained professional growth and to assist with temporary surges and slowdowns. • A supportive corporate management team that considers the needs of the individual as well as those of the organization. All employee performance issues will become evident to the PM through various means (weekly team meetings, weekly/monthly progress reports, one-on-one discussions, missed deadlines, negative task reviews, and customer feedback). If a performance issue arises as a result of failure to meet a critical milestone established either in the work statement or as assigned, appropriate actions are taken immediately. These actions could include performance counseling, training or retraining, and/or closer supervision. If performance continues to be below standard, more severe actions take place and result in reassignment, demotion, or removal and replacement. To ensure that the staff member understands the performance issue, the PM will meet with them to discuss these issues and to clarify expectations. The PM reviews with the staff member the reference materials and SOPs that apply. The staff member is given specific examples of the performance in question, as well as possible remedies, with the goal being to improve their performance. This action usually corrects most issues. As a matter of procedure, though, the PM keeps HR apprised of the progress of the corrective actions to ensure accurate documentation of the issue and identification of the steps that will be required in the event a formal action is needed at a later date. Additionally, the PM provides HR with the performance standards provided to the staff member to ensure that they are compliant with current SOPs. The Agency or Client COR is kept apprised of this progress from beginning to resolution.
6	Do you have program(s) in place for quality assurance, customer satisfaction, and performance measurement? If yes, please describe.	Yes, please see above.
7	What process do you follow to ensure the proposed resumes meet your client's request?	Team SGI's standardized selection process for the RFQ task orders to be issued under this contract begins when we receive an RFQ and identify specific requirements. To facilitate rapid response to the RFQ, our PM first notifies relevant functional staff of the upcoming requirement and quickly convenes a working session to assess the RFQ requirements against the Team's ability to meet them. Next, the PM distributes the task order SOW and other pertinent information to the appropriate subcontractor(s) – in this case 2bFocused – already on our team. Next, 2bFocused submits its cost and technical proposals—consisting of resumes and skills matrices tailored to the RFQ SOW requirements—to the PM for consideration. The PM then uses a CMMI-based decision analysis and resolution (DAR) process to evaluate competing subcontractor proposals to select the best-value personnel to perform the work. Best-value personnel are selected using a weighted scale and combination of resume strength compared against RFQ requirements; availability of personnel with a greater weight given to personnel already on staff; functional category assignment; security clearances; and cost, regardless of affiliation.
8	How do you schedule engagements?	Members of Team SGI have supported Federal agencies with their Program Management Enterprise Teams (PMETs), by managing the Programs' Integrated Master Schedules (IMSs). This support and management has included developing the Human Performance deliverables that support the overall program and delivering the Communication/Change Management Plan across the agencies. Team SGI's members have also assisted with the development of program/project cost and technical schedules and goals and strategic workforce planning. This experience is used to begin an analysis of the overall staffing plan. Our Team then executes an analysis to break down the program milestones and achievements against a timeline to gain an understanding of the technical and schedule requirements. We execute "what if" analyses to understand how we can improve overall program performance and/or reduce risk. These analyses include cost-benefit analysis, risk analysis, and fit analysis. This breakdown leads to accurate and well-understood cost, technical, and strategic workforce plans, and assessments of potential manpower issues. The results of our analyses will allow us to quantify risks and formulate preemptive solutions.
9	Do you have an electronic system for scheduling? If yes, please describe.	Please see response to Question #8 above.

10	What processes do you use to ensure seamless service by subcontractors to NYS?	Team SGI knows that management complexity and program risk increase proportionately with the number of subcontractors utilized. To manage this risk, Team SGI will function as a single, integrated team. Our goal is to make delivery of subcontractor capabilities transparent to NYS OGS. Our approach to having an integrated program team provides for cohesive interaction with overall management processes and procedures. SGI's management of its subcontractor requires the same quality, budget, and schedule performance of personnel, regardless of organizational affiliation. Our process for monitoring 2bFocused's performance entails weekly collection of actual performance data (hours, costs, schedules, and technical accomplishments) that will be measured against the requirements of the RFQ TO being managed/supported. Performance reviews will be implemented monthly and cost and schedule control will be monitored against a resource allocation schedule. We will use our proven subcontractor management process that provides clear guidelines for the management control, cost control, and work allocation process for our team member. Our subcontractor management strategy emphasizes commitment and integration. Our integrated team approach ensures that our qualified team member is committed to each RFQ awarded and the work performed is well coordinated and of acceptable quality. Team SGI will submit bids in response to RFQ requirements, accept tasks, and assign resources for those tasks. Our subcontractor, 2bFocused, will be subject to the standardized policies and procedures, quality controls, and reporting requirements developed and enforced by the NYS OGS Administrative Support Services - Temporary Personnel PMO.
11	How do you maintain and track unallowed and preferred candidate lists for your clients?	As part of Team SGI's general recruiting strategy, we define ideal hires and become more strategic in reaching our ideal candidates through detailed job descriptions, postings, and knowing the importance of recruitment marketing. We prepare for future hiring needs and avoid talent shortages by thinking like marketers and creating candidate pipelines. These pipelines provide descriptions of each candidate's work experience, skills and capabilities, education and certifications, clearance statuses, and a detailed history of each interview to include comprehensive feedback and notes.
12	What is your escalation and resolution policy (in case an issue or emergency arises)?	Team SGI offers a robust organizational structure that ensures visibility and responsiveness to program requirements. We designate a Project Manager (PM) to each RFQ project who has the authority, responsibility, and accountability to manage all resources and will meet cost, schedule, and technical objectives of the RFQ contract tasks. The PM is also the sole authority on all aspects related to the assigned RFQ contract management, including communication, risk management, issue resolution, and staffing. Additionally, Team SGI's combined executive leadership is responsible for ensuring our PM is allocated adequate corporate/PMO resources, quality management oversight, and for remedying issues that must be escalated above the RFQ project level. This hands-on approach by Team SGI's executive management ensures prompt and complete resolution of issues that may arise.
13	What is your process for providing a replacement if a Temp is rejected by the client? Please include details such as the time it takes to replace, and the training plan for the new Temp.	Between Team SGI's combined corporate shared services under the PMO and our strong recruiting capabilities, we have deep resources for candidate sourcing, which can significantly reduce backfill time. In addition, we continually enhance our human capital resources by expanding the skills of existing staff through training, cross-training, coaching, and preparing them for positions as they become available. Finally, our continuous recruitment activities, tools, and outreach efforts ensure a large pool of candidates within our talent databases. This established and ever-growing candidate pool provides continued access to qualified personnel replacements and ensures that we can provide the needed replacement personnel who are qualified, experienced, trained, and ready to start work within 10 business days of receipt of notification of rejection or need for replacement. As a methodology for the expedient replacement of Temp staff, we enhance our multi-disciplinary staffing approach through the use of cross-training of our personnel. Cross-training allows us to rotate staff across different job functions to meet spikes and surges and improves our ability to reassign personnel. In addition to cross-training, we deploy paired backups. We pair staff members with an assigned backup to achieve appropriate levels of redundancy in each functional area. If a personnel replacement is necessary, the paired backup can quickly assume the roles and responsibilities. Lastly, we maintain a pool of cleared personnel for the commonly used labor categories, hard to find certifications, and/or positions that historically experience high turnover. Using our HR staffing databases, we quickly identify replacement personnel to compensate in advance of these situations.

14	Does your company have a formal, published quality assurance program (measuring retention, job matching, performance of Temps on the job, etc.)? If yes, please provide details of the program and attach program documentation. If no, describe in detail the process your company intends to employ to ensure that NYS receives the best service and candidates possible.	Yes we do. Team SGI believes that quality management is driven through effective metrics. Effective metrics are metrics that allow us to monitor our progress against specific goals and provide meaningful information. Placing great importance on metrics and using these to continuously improve individual and corporate performance, our Team's combined corporate support structure provides our staff in the field with always-accessible quality-driven processes, one-on-one guidance, best practices, and tools essential for their success with fulfilling their temporary assignment. As experienced Federal contractors, we understand the importance of tracking progress against cost, schedule, and performance measurement baselines (PMBs) in near real-time. We are motivated to do a quality job right the first time in an environment of continuous process improvement, both in the short- and long-term. We maintain a Corporate Scorecard with specific personnel, financial, and quality goals, which are updated quarterly and shared with staff. Due to this culture of metric-based performance management, Team SGI embraces managing to quantitative metrics on each customer engagement, as distinct from managing to less precise qualitative measures. When our Team establishes baseline performance standards, we also set threshold values, which are inside the acceptable level of quality delivery but provide indicators and warnings for our management. Our metrics-based approach to quality control (QC) is designed to identify areas where potential problems may occur before they impact performance. In this way, we are able to intervene and take management action to correct the issue immediately before service falls below the established Acceptable Quality Levels (AQLs). These processes are developed from best practices, experience, and lessons learned from combined Team programs. As part of our program management methodology, Team SGI's QC Plan (QCP) – which will be submitted first as a draft for review during RFQ transition-in – defines how we manage all quality levels. Our QCP, tailored for each RFQ contract, defines how we track, manage, and achieve metrics at both theCentralized Back-Drop Contract and RFQ Order levels. Program-level metrics are a balanced set of performance metrics to be achieved on a bi-annual basis across the program. These metrics are measured and reported on a quarterly basis and jointly reviewed bi-annually for revision (if necessary). General task metrics are defined in the master quality plan, and any additional metrics will be defined in the RFQ plan that we will submit for each specific RFQ Order awarded. We use our QCP to make certain systematic QC methods are in place and applied as designed. The development of the QCP involves the application of an inspection process to each specific task to ensure contract performance is within acceptable limits. Communication and reporting activities will convey information on project status, potential/actual problem areas, and corrective actions.
15	Does your firm check websites such as Department of Health, Office of Professional Medical Conduct, etc. for licensure and/or accreditation information when hiring/providing candidates for Health Occupations? If yes, please provide the website address(es) you check. If no, please describe how you validate credentials for these professions.	N/A.
16	What is your current fill ratio?	SGI's current fill ratio is 96%.
17	What is your current turnover rate for your temporary workers?	SGI's current turnover rate for our temporary workers is 3% over the last 3 years.
18	What type of programs do you have to limit absenteeism and turnover?	As a team that has worked together on awarded contracts, we are vigilant in thoroughly screening candidates, providing rewarding work, fair pay and benefits, and robust training programs and rewarding performance; all practices that ensure the highest levels of retention, limit absenteeism, and minimize turnover. High retention rates are attributed to Team SGI's focus on career growth and creating work environments that challenge and engage our employees. Examples of this commitment are evidenced in: •Promotion within the team, with existing, qualified staff considered for open positions before recruiting new personnel, thereby providing career growth and retaining program knowledge. •Recognition and reinforcement of exemplary work, with management and supporting technical incentive awards and spot award bonuses granted annually. •Numerous training opportunities for career growth and to encourage retention. •Flexible work schedules, as permitted by client needs. •Competitive compensation and benefits packages. •Regular performance reviews designed to structure employee growth.
19	What is your current absenteeism rate for your temporary staff?	SGI's current absenteeism rate for our temporary staff is 3%.

| 20 | What policies/processes do you use to maintain high fill rates and to mitigate high turnover rates? | Team SGI's benefit packages offered to our Temporary Personnel include paid holidays, personal leave, medical, vision, dental, life insurance, long-term disability insurance, a tuition reimbursement plan, and a 401(k) savings plan. All our benefit plans are reviewed and updated regularly to ensure that they are competitive within the market. In addition to competitive salaries and excellent benefits, Team SGI provides our temporary personnel with technical training, educational conferences, career advancement, internships, employee referral program, spot bonuses, and opportunities to volunteer within the community, and more. Team SGI's incentive compensation plans allow for both annual base pay increases as well as annual bonuses, based on our employees' and the company's performances. Employees accrue added benefits in-line with their tenure. Team SGI's bonus programs recognize successful performers and there is latitude for special recognition for extraordinary performance that acknowledges superior performance and longevity through monthly and annual awards programs. Such awards include monthly prizes such as movie and/or dinner tickets, gift certificates, and tickets to professional sporting events or cash bonuses. We invest company profits to build employee morale and camaraderie through lunches, holiday events, and other special considerations. Salary levels are reviewed periodically as a means of monitoring labor market conditions and economic factors to ensure we are competitive. For contracts that are subject to the laws/guidelines of the Service Contract Act (SCA), we routinely conduct internal audits to make sure we are in compliance with the SCA wage determination. Team SGI's remuneration system recognizes job requirements, employee-related knowledge and skills, and performance-related incentives that link individual, team, work unit, and organization performance. The remuneration includes a host of benefits, as described above, that protect and expand the lifestyle and health of our employees and their families.
We strongly emphasize employee teamwork, a challenging work environment, employee growth, development, and creativity. The positive relationship between Team SGI's employees and management demonstrates the close, team-oriented spirit that characterizes a small firm. This relationship, augmented by sound management principles, administrative procedures, and attractive benefits packages, has proven to be extraordinarily effective in providing responsive, temporary services support. Our ability to attract and retain our employees is indicated by our low turnover rates and consistent positive feedback from customers about our workforce. |
| 21 | Do you subcontract any of your work to support excessive workloads, either via independent contractors or through other firms? Please describe your policies, your company's process and criteria for selection of subcontractors/suppliers (if applicable). | Yes we do. Team SGI is made up of two highly experienced companies brought together to accomplish the program objectives set forth in the Centralized Backdrop Contract solicitation. We recognize that the challenges and complexities of using subcontractors must be weighed against the ability to accomplish contract objectives, while managing performance risk. Our team member, 2bFocused, has been carefully selected for its ability to provide relevant capabilities, experience, and resources to augment those of SGI. Our experience working with 2bFocused over the past several years has enabled us to build and maintain a strong relationship with this company. SGI has already initiated and executed the Contract Teaming Agreement (CTA) for this effort to solidify our commitment to the NYS OGS. Team SGI's composition is based upon our understanding of the requirements essential to manage this Centralized Backdrop Contract and RFQs issued under it. We intend to provide the NYS OGS with the level of quality service that is expected of a contractor who has provided a relevant range of staffing for very similar requirements for the past two decades. Team SGI brings to NYS OGS the following attributes:
•Experience performing the required services for the NYS OGS and other agencies
•Reputation and track record of high-quality work
•Reasonable cost/rate structure
•Geographic coverage
•Program management, administrative support, financial management, engineering, modeling, IT, business transformation, audit, risk advisory, strategic planning, change management, and various other technical capabilities
•Proven commitment to providing continuity of highly qualified temporary personnel statewide
•Knowledge of trhe NYS OGS organization, climate, and culture
•Capacity, resources, and program management structure to be extremely responsive to RFQs issued |

22	What are your recruitment policies?	Meeting this contract's dynamic temporary staffing needs in a timely manner, with quality personnel who are properly trained, processed, and ready to work for this NYS OGS Temporary Personnel Administrative Support Services program is paramount to success. Our reach-back to the 2bFocused shared recruiting services includes full-cycle staffing, incumbent capture, and employee onboarding. We leverage a full-time Recruiting team that implements a five-step recruitment process, including: * Preliminary Screening: We initiate the screening process by 1) Posting a requisition to relevant websites and job boards and professional organizations, 2) Querying our internal database for potential candidates, 3) Networking within the community of qualified temporary personnel for the required Lot, and 4) Reviewing our applicant tracking system for previously considered applicants. Education and experience validation occur during this stage. * PM Screening: Within 48 hours of a vacancy posting or issuance of an RFQ, initially screened résumés are submitted to the PM for review to ensure only the most qualified candidates that meet requirements are considered. * Candidate Interview: Our PM conducts the interviews to confirm/validate a candidate's qualifications against requirements and level of interest. * Compensation Negotiation: We conduct compensation negotiations and offers. * Onboarding: Once the signed offer letter is received from the candidate(s), the PM works with the COR and HR to seamlessly onboard the employee(s). Key to our recruitment process is the focus on personal networking (word-of-mouth), use of technology, and professional recruiting methods to identify the right candidate for the role. Qualified candidates are located through a variety of sourcing methods including job boards, professional networking sites, employee referrals, Team SGI's candidate databases, and relevant professional organizations. A combination of structured behavioral-based interviews and rigorous reference checking results in selection of candidates who are optimal fits for the positions. We announce vacancies internally and offer referral bonuses for candidates referred by existing employees.
		During each RFQ Contract transition, our staff will become fully aware of all critical and routine actions and Plans of Action and Milestones (POA&Ms) in process. Team SGI's new hire orientations are provided for all new and incumbent staff being transitioned onto each RFQ contract. These orientations provide the new staff with information on our Team's combined policies, compensation and benefits, client requirements in terms of support, policies for unscheduled leave and absences, and performance requirements and standards. These sessions also iron out and assist with the coordination of the government-provided and Team SGI-provided required training prior to start of work. Team SGI will employ a four-phase approach to a seamless transition for each awarded RFQ contract, including: Phase 1: The Pre-Award Phase / Planning–The pre-award or planning phase is used to establish draft documentation and gain general information that will be useful during the remaining three phases. Team SGI's HR department interfaces with the incumbent staff (as applicable), arranging appointments and interviews during non-business hours to facilitate their transition to the team; the same process is followed for new hires. Our PM is incorporated into the Team SGI interview and selection process. We will then issue offer letters to selected and confirmed staff welcoming them to the team and notifying them of on-boarding requirements and arrangements.

| 23 | Describe your implementation plan for initiating this program at NYS if awarded a contract. Include your company's plan for taking on a large volume of requests during the first phase of the contract. Such a plan may include transferring candidates from other contractors to your company's internal resource pool, partnering with additional subcontractors to meet NYS's needs and implementing the program. | During the pre-award/planning phase, we identify risks and mitigation strategies, define the transition organization, build schedules, prepare draft plans, and ensure comparable core benefits—all with the goal of minimizing impact on current NYS OGS Authorized User / ordering entity mission and activities while ensuring a complete and timely transition. Our pre-award/planning phase activities allow us to "hit the ground running" right from the transition kickoff meeting and to immediately build the communications, operational, and administrative apparatus to ensure a successful transition, with assumption of full responsibility on day one of the performance period.

Phase 2: The Pre-Transition Phase / Transition Strategy—entails coordination by Team SGI's transition team to finalize transition strategy and planning and receive key data and information required for a smooth transition. This includes establishing POCs for Team SGI's tasks and the transition team(s); obtaining and reviewing copies of ongoing tasks; confirming lists of incumbent personnel as applicable; establishing early coordination with the incumbent's management and HR to establish protocol and communications channels; confirming background investigation and/or security clearance requirements, if required; establishing guidelines and schedules for work area observations; and identifying and preparing plans to mitigate additional potential risks to name but a few of our activities. Our transition strategy is designed to ensure successful incumbent capture, knowledge retention, and the transfer of full operational capability by or before the transition period ends. Ideally, we aim to execute Phase 2 after the selection process but before transition starts in order to jump-start the transition process.

Phase 3: The Transition Phase—commences immediately upon completion of the pre-performance (or kickoff) meeting coordinated as part of the transition period and according to contract requirements. Phase 3 activities include conducting an open house to allow potential incumbent employees to learn about Team SGI, meeting customer management, and getting questions answered; providing brochures on the Team SGI approach and advantages offered employees; bringing on Team SGI's task leaders after hours (at no additional cost to the Government) to help coordinate transition details and to assist with screening personnel, liaising with current RFQ Contract team members to facilitate recruitment efforts; setting up interviews starting with key RFQ Contract team members; issuing offer letters; determining positions for which additional recruiting is required; and recruiting necessary skilled personnel. In addition, all appropriate plans are updated and submitted.

Phase 4: The Post-Transition Phase—the Post-Transition Phase is when the detailed transition plans and schedules are finalized for Government approval. Based upon our understanding of the requirements outlined in the solicitation, combined with our team's extensive experience successfully phasing in programs of similar size, scope, and complexity, Team SGI's transition plan accommodates all activities. We recognize that the services currently provided are usually vital and must be continued without disruption. Our transition plan encompasses techniques, practices, and tools that have proven effective repeatedly, and incorporates lessons learned from these experiences.

Our transition management team consists of our PM and our qualified and experienced PMO staff including Contracts Management, Finance, HR, QC/QA, IT support, and Accounting. Team SGI's phase-in process is well thought out and detailed to avoid disruption to the NYS ordering entity and its ongoing operations. Upon RFQ Contract notification of award, Team SGI notifies our proposed and approved key personnel and completes the hiring process. We then begin transition of our management team to the designated locations and/or facilities. Our executive management will meet the COR and CO as soon as we can coordinate the Kickoff Meeting. This key meeting uses the draft Transition Plan, with any modifications, as the focal point of the meeting. We develop a key contact list of all critical personnel from Team SGI and from the Ordering Entity/Authorized User and this is included in our Communications Plan. We adjust or revise the schedule as circumstances warrant and in collaboration with the CO and assigned COR.

Daily coordination with the RFQ Contract COR will be implemented to ensure any issues identified are resolved quickly and that the COR is aware of the transition status at all times. The Team SGI PM is also involved in (1) RFQ Contract assessment and staffing; (2) transfer of any assigned GFE to Team SGI (in conjunction with RFQ COR); and (3) interviewing and hiring of critical incumbent personnel if applicable. During phase in, as part of our SOPs, all GFE is recorded and throughout the period of performance audits will be taken to ensure the accuracy of our GFE inventory log. This efficiency ensures a seamless materials transfer during transition to the incoming contractor. All documentation, reports, and items needed to facilitate contract and/or task close out actions is transferred completely and compliantly with checks to ensure completion prior to final report.

Incumbent Capture Capabilities: Team SGI's experience and capture of incumbent personnel will ensure NYS OGS that the technical, operational, and administrative support services required will proceed without interruption. We have provided as few as 2 and as many as 76 project personnel for EXIM Bank, USDA, GSA, and ARNG. Team SGI's incumbent capture process ensures a seamless transition, continuation of support services, and an effective, smooth start to contract support. Our Team understands that transitioning a TO contract requires careful advanced planning; identification of potential risks before transition starts and a plan to mitigate those risks; a streamlined and effective transition organization with clear lines of authority; clear communication lines with customer personnel; a competitive salary and benefits package to attract incumbent employees; and a commitment to working with the current incumbent prime contractor(s) to minimize impact on ongoing projects. Team SGI is fully committed to performing all of these activities to ensure effective RFQ Contract transitions occur each and every time. In order to do this, one of our first steps is to ensure that quality-performing incumbent personnel are given the first right of refusal. Our goal is to completely hire all targeted incumbent personnel as applicable. Team SGI is committed to offering incumbent personnel competitive salaries and benefits in order to keep them whole. In addition, we constantly work with our recruiters to build a pipeline of candidates in the event incumbent staff exercise their first right of refusal. Next, we identify the most qualified incumbent personnel, then interview and extend offers. Hiring the highest performers directly supports the retention of qualified members of the incumbent technical staff and builds cooperative relationships with the incumbent workforce. |