



PROCUREMENT
DIVISION



California
DEPARTMENT OF TECHNOLOGY

Joint Communiqué

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**TO: Purchasing Authority Contacts (PACs)
Procurement and Contracting Officers (PCOs)
Agency Information Officers (AIOs)
Chief Information Officers (CIOs)**

RE: NEW – Post Evaluation Form for IT Services Contracts

This Broadcast Bulletin (BB) is a joint communication by the Department of General Services (DGS) and the California Department of Technology (CDT) to communicate new procurement policy and procedures effective January 1, 2020 that implement statutory changes set forth in AB 971, which added section 12102.3 to the Public Contract Code (PCC).

SUMMARY OF NEW REQUIREMENTS – STATE DEPARTMENTS ARE REQUIRED TO:

1. Complete a post evaluation of each completed information technology (IT) services contract totaling \$500,000 or more AND related to an IT project (both delegated and non-delegated IT projects as defined in the State Administrative Manual).
2. Use the standard form STD 971 - Post Evaluation for IT Services Contracts. This new standard form was jointly developed by DGS and CDT with feedback from the IT industry.
3. Adhere to and implement the new procurement policy and procedures as specified in the new State Contracting Manual (SCM) and State Administrative Manual (SAM) sections identified herein. The new law requires certain actions within specified time periods; this detail is found in the new SCM section.
4. Create internal procedures unique to your department that implement the new SCM sections.

EFFECTIVE DATE:

January 1, 2020. Specifically, this new requirement applies to IT services contracts (meeting the criteria identified in item #1 above) that are **completed after January 1, 2020**. The completion date is the contract term end date including all amendments.

STD 971- POST EVALUATION FOR IT SERVICES CONTRACTS FORM

The new STD 971 form can be found here [Statewide Forms Directory](#)

OPTIONAL USE OF THE STD 971 FOR OTHER IT SERVICES CONTRACTS:

At this time, state departments are encouraged to use the STD 971 for all other IT services contracts (i.e. below \$500,000 and not related to an IT project). State departments may implement internal procedures for the use of the STD 971 form for IT services contracts below \$500,000 or IT services contract above \$500,000 that are not related to an IT project. This information is included in the new SCM section.

STD 4 – CONTRACT/CONTRACTOR EVALUATION FORM:

State departments are not required to complete a STD 4 – Contract/Contractor Evaluation, for IT consulting services contracts. The applicable SCM sections, as noted herein, have been updated to reflect this change. The STD 4 remains a requirement for non-IT consulting services contracts.

CDT IS THE STATE’S CENTRAL DEPOSITORY for STD 971:

The new law requires CDT to be the state’s central depository for copies of STD 971. The new SCM sections (identified herein) contain detailed procedures on when, how, and where to submit the STD 971 to CDT.

PROCUREMENT POLICY AND PROCEDURES:

The following sections of the SCM and SAM have been added and/or modified in order to implement PCC 12102.3:

SCM Volume 3

- Added – Post Evaluation for IT Services Contracts – Chapter 11 – Topic 5
- Modified - The Do’s & Don’ts of Contract Administration – Chapter 11 – Topic 2 *(Modified to remove the STD 4 requirement for IT consulting services contracts)*

SCM Volume F

- Added – Post Evaluation for IT Services Contracts – Chapter 9, Section D, Topic 6
- Modified – The Do’s and Don’ts of Contract Administration – Chapter 9, Section D, Topic 2 *(Modified to clarify that the STD 4 requirement is applicable to non-IT consulting services contracts)*

SAM

- Modified - Post Award Activity – 5230.3

NEXT STEPS:

DGS and CDT will collaboratively develop guidance on how state departments can obtain and use the STD 971 data available in CDT’s statewide central depository.

Please direct questions as follows:

<p>For IT services acquisitions conducted under DGS’ procurement authority:</p> <p>Purchasing Authority Unit PAMS@dgs.ca.gov</p>	<p>For IT services acquisitions conducted by the CDT on behalf of state departments pursuant to CDT’s IT project procurement authority:</p> <p>Statewide Technology Procurement Form971@state.ca.gov</p>
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