

*Note: All informational text in italics should be removed prior to release to suppliers.
Use only for informal IT services competitive up to \$500K. Over \$5K must be advertised; over \$100K must include protest language and 5-day intent to award language. May use for cost only or value effective evaluation. See PAM Chapter 4.*

STATE OF CALIFORNIA

Department of _____

Request for Quotation For Information Technology Services

QUOTE DUE DATE: QUOTE OPENING:	Quotes must be delivered to _____ _____ before 2:00PM on the due date	
Supplier name and address:	SOLICITATION NO. REV. # DATE _____ _____	REQUISITION OR CONTROL # _____
Contact: Phone: Fax:	For further information contact: Ship To: (see below or bid document)	ARE YOU CLAIMING PREFERENCE AS A SMALL BUSINESS: YES _____ NO _____ IF YES, MANUFACTURER? YES _____ NO _____ ARE YOU A NON-SMALL BUSINESS CLAIMING AT LEAST 25% SMALL BUSINESS SUBCONTRACTOR PREFERENCE? YES _____ NO _____
Name (Print): ▶ _____ Title: ▶ _____ Signature: ▶ _____ Date: _____ Federal Employer Identification Number: ▶ _____	Return bid to: Department of _____ (Show address here)	SECTION 14838 ET SEQ. OF THE CALIFORNIA GOVERNMENT CODE REQUIRES THAT A 5% PREFERENCE BE GIVEN TO BIDDERS WHO QUALIFY AS A SMALL BUSINESS AS A NON-SMALL BUSINESS CLAIMING AT LEAST 25% CALIFORNIA CERTIFIED SMALL BUSINESS PARTICIPATION FOR REQUIREMENTS SEE TITLE 2, CALIFORNIA CODE OF REGULATIONS SECTION 1896 ET SEQ. THE REQUIREMENTS FOR NONPROFIT VETERAN SERVICE AGENCIES QUALIFYING AS A SMALL BUSINESS ARE CONTAINED IN SECTION 999.50 ET SEQ. OF THE MILITARY AND VETERANS CODE.

Bidder offers and agrees if this response is accepted within 45 calendar days following the date the response is due to furnish all the items upon which prices are quoted, at the prices set opposite each item, delivered at the designated point(s) by the method of delivery and within the times specified and subject to the attached General Provisions. DECLARATIONS UNDER PENALTY OF PERJURY: By signing above, with inclusion of the date of signature, the above signed bidder DECLARES UNDER PENALTY OF PERJURY under the laws of the State of California as follows: (1) (STATEMENT OF COMPLIANCE). The above signed as complied with the non-discrimination program requirements of Government Code 12990 and Title 2, California Administrative Code Section 8103, and such declaration is true and correct. (2) The National Labor Relations Board declaration set forth in Paragraph 48 of the General Provisions is true and correct. (3) If a claim is made for the Small Business or Disabled Veterans Business preference, the information set forth within is true and correct.

Description

The purpose of this Request for Quote for Information Technology (IT) Services is to provide (*enter type of service, i.e., IV&V*) services in support of the (*insert name of project*).

The following attachments are incorporated as part of this Request for Quote for IT Services:

Attachment 1: Requirements, including quote details and cost proposal and all attachments

Attachment 2: STD 213 for IT Goods and Services Only, see Section I.G.11 and

<http://www.documents.dgs.ca.gov/pd/modellang/std-213.pdf>

Attachment 3: Bidder Instructions (GSPD-451)

REQUEST FOR QUOTE FOR SERVICES

(insert Table of Contents)

(insert name of project)
Requirements

You are invited to review and respond to this Request for Quote for IT Services (RFQ-ITS), entitled *(insert name of department, number of quote and name of project)*. In submitting your quote, you must comply with the instructions found herein. The services required are delineated in the Statement of Work. Please read the enclosed document carefully.

Quotes must be received no later than the date and time specified on the face of this RFQ-ITS and in Section I.D. Key Action Dates.

I. General Information

A. Purpose

The State of California, *(insert name of department)* requires the services of a Contractor to provide *(insert brief description)* services in support of the *(insert name of project)*.

The *(name of project)* addresses the *(insert brief project description)*

The period of performance for this contract is approximately *(insert # of months or years)*. The current budget allocation to support the services outlined in this document is *(insert budgeted \$\$ or delete this sentence.)*

B. Availability

The selected contractor must be able to meet the requirements of this RFQ-ITS and be ready to begin work within ten (10) business days of the contract award date specified in Section I.D. Key Action Dates. If personnel offered by the selected contractor leave the contractor's firm or are otherwise unable to participate in this contract, they must be replaced with comparably qualified personnel who meet the minimum qualifications as stated within this RFQ-ITS. All replacement personnel are subject to approval by the State.

C. Period of Performance

The term of this Agreement begins on the date as indicated on the Standard Agreement for IT Goods/Services (STD213) through xxxxxxxx,xx,xxxx with the option for the State to extend the term for up to one year *(or other term as determined by the department)* at the rates specified in Attachment 2 Cost Sheet that includes optional costs for optional extensions to the contract. The period of performance must be changed by a written Amendment to the Agreement, if the department exercises its option to extend services.

The contractor shall not be authorized to deliver or commence performance of services as described in this Statement of Work (SOW) until written approval has been obtained from all entities. No delivery or performance of service may commence prior to the execution of the Agreement.

D. Key Action Dates

Listed below are the key action dates and times by which the actions must be taken or completed. If the State finds it necessary to change any of these dates, it will be accomplished via an addendum to this RFQ-ITS.

Key Action Dates	Date
1. Release of RFQ-ITS	
2. Submission of written questions	
3. Departments response to written questions	
4. Submission of Quotes (by date and time)	
5. Contract Award	

All dates after the Submission of Quotes (date and time) are approximate and may be changed if needed to allow the State additional time for evaluation and contract execution.

E. Written Questions

All questions regarding the content of this RFQ-S must be submitted in writing by fax, mail or electronically to _____ and must be received by the Key Action Date identified above. Questions not submitted in writing by the Key Action Date for submission of written questions shall be answered at the State's option.

When the State has completed its review of the questions, all of the questions and answers will be distributed in writing by fax, mail or electronically mailed to all bidders.

F. RFQ-ITS Response Guidelines

This RFQ-ITS and the Contractor's quote in response to this document will be made a part of the contract. Responses to this RFQ-ITS must contain all data/information requested and must conform to the format described in this RFQ-ITS. It is the Contractor's responsibility to provide all required data and any other information deemed necessary for the State's evaluation team to determine and verify the Contractor's ability to perform the tasks and activities defined in the Contractor's Statement of Work.

Facsimile machine bids will be considered only if they are sent to (office fax number) for solicitations originating from the (department office location). Bids sent to any other (department unit name) fax number will not be considered. To be considered, all pages of the faxed bid that are received prior to the bid opening time specified in the bid will be considered "the complete bid". Please be advised that there is a heavy demand placed on the fax machine receiving bids and the State assumes no responsibility if a supplier cannot transmit their bid via fax, if the entire bid is not received prior to the bid opening time.

G. RFQ-ITS Response Content

The following documents must be submitted in the RFQ-ITS response.

1. Cover Letter – Attachment 1
Bidder must complete and attach the cover letter included in this RFQ-ITS as Attachment 1
2. Cost Sheet – Attachment 2
Bidder must complete the cost sheet that identifies total cost per transaction as described in the Statement of Work using the format in Attachment 2 – Cost Sheet. This cost sheet includes an entry for Optional Contract Extension Cost. These costs would be in effect should the State exercise its option to extend the term for up to one year (*or specify other term*).
3. Customer Experience References – Attachment 3

The bidder must submit a minimum of one (1) *(or specify another minimum)* reference or may submit up to xxx references to validate experience providing XXX services for projects with similar scope, schedule and resources to this project.

The bidder shall complete one (1) Customer Experience Reference Form, Attachment 3 for each reference. The descriptions of these projects must be detailed and comprehensive enough to permit the State to assess the similarity of those projects to the work anticipated in the award of the contract resulting from this procurement.

The State may contact customer references during the week following submission of Quotes to validate the information provided by the bidder and to determine the customer's overall satisfaction with the services provided. Therefore, it may prove beneficial to the bidder to contact its referenced customers to ensure their contact information provided on the Customer Experience Reference Form is up-to-date and that the reference will be available during the period of time that the State will be validating references.

4. Confidentiality Statement – Attachment 4
The Confidentiality Statement must be signed and dated by the bidder, its employees and subcontractor employees working on this project, and submitted with the bidder's proposal.
5. Payee Data Record – Attachment 5
The successful bidder will be required to submit a Payee Data Record, STD. Form 204 listing their Taxpayer Identification Number.
6. CA DVBE Requirement - Attachment 6
The bidder must complete Exhibit 6 and submit with its bid, if applicable.
7. Bidder Declaration – Attachment 7
The bidder must complete Attachment 7 and submit with its bid
8. TACPA – *(Required for contracts that will exceed \$100,000.)*

If you qualify for more than one bidding preference (TACPA, Small Business), the maximum preference allowed by law is 15% or \$100,000.

If any of these "acts" apply complete the appropriate form and attach it to your response.

TARGET AREA CONTRACT PREFERENCES ACT (TACPA)

(STD. 830S for Services)

Preference will be granted to California-based Contractors in accordance with Government Code Section 4530 whenever contract for goods and services are in excess of \$85,000 and the Contractor meets certain requirements as defined in the California Code (Title 2, Section 1896.30) regarding labor needed to produce the goods or provide the services being procured. Bidders desiring to claim Target Area Contract Preferences Act shall complete Std. Form 830 and submit it with the Final Proposal. Refer to the following website link to obtain the appropriate form:

<http://www.documents.dgs.ca.gov/osp/pdf/std830.pdf>

9. **DVBE PARTICIPATION** - *add the following language as required by the department or department must state that the Department Director has exempted this contract from DVBE participation.*
- The State has established goals for Disabled Veteran Business Enterprises (DVBE) participating in State contracts. Please review the attached DVBE program requirements package. Bidders must complete and return all the appropriate pages in order for the quote to be considered responsive.
- (Note to Buyer** – *You must select which version of the CA DVBE Program Requirements Packet you are including in your solicitation and delete reference to the link that is not being used.)*
- For competitive solicitations released through March 1, 2006 the following link directs you to the CA DVBE Participation Requirement Packet dated 02/28/05.*
- <http://www.documents.dgs.ca.gov/pd/delegations/STD840.doc>
- For competitive solicitations released after March 1, 2006 the following link directs you to the CA DVBE Participation Requirement Packet dated 12/15/11 that includes the DVBE Incentive table.*
- http://www.documents.dgs.ca.gov/pd/poliproc/Master-DVBEIncentiveRequireGoodIT11_1215.pdf
10. **SMALL BUSINESS REGULATIONS** - The Small Business regulations, located in the California Code of Regulations (Title 2, Division 2, Chapter 3, Subchapter 8, Section 1896 et. seq.), concerning the application and calculation of the small business preference, small business certification, responsibilities of small business, department certification, and appeals are revised, effective 09/09/04. The new regulations can be viewed at (www.pd.dgs.ca.gov/smbus). Access the regulations by Clicking on “Small Business Regulations” in the right sidebar. For those without Internet access, a copy of the regulations can be obtained by calling the Office of Small Business and DVBE Services at (916) 375-4940.
11. **NON-SMALL BUSINESS SUBCONTRACTOR PREFERENCE** - A 5% bid preference is now available to a non-small business claiming 25% California certified small business subcontractor participation. If applicable, claim the preference in the box on the right hand side of the first page of this solicitation.

12. **SMALL BUSINESS NONPROFIT VETERAN SERVICE AGENCIES (SB/NVSA) -** SB/NVSA prime bidders meeting requirements specified in the Military and Veterans Code Section 999.50 et seq. and obtaining a California certification as a small business are eligible for the 5% small business preference. If applicable, claim the preference in the box on the right hand side of the first page of this solicitation.

13. **ATTACHMENT WITH QUOTE REQUIRED IF CLAIMING THE SMALL BUSINESS PREFERENCE-** All bidders must complete and include the Bidder Declaration form GSPD-05-105. If claiming the non-small business subcontractor preference, the form must list all of the California certified small businesses with which you commit to subcontract in an amount of at least twenty-five percent (25%) of the net bid price. All certified small businesses must perform a “commercially useful function” in the performance of the contract as defined in Government Code Section 14837(d)(4).

<http://www.documents.dgs.ca.gov/pd/poliproc/MASTER-BidDeclar08-09.pdf>

14. **SMALL BUSINESS CERTIFICATION -** Bidders claiming the small business preference must be certified by California as a small business or must commit to subcontract at least 25% of the net bid price with one or more California certified small businesses. Completed certification applications and required support documents must be submitted to the Office of Small Business and DVBE Services (OSDS) no later than 5:00 p.m. on the bid due date, and the OSDS must be able to approve the application as submitted

Small business nonprofit veteran service agencies (SB/NVSA) claiming the small business preference must possess certification by California prior to the day and time bids are due.

Questions regarding certification should be directed to the OSDS at (916) 375-4940.

15. **DECLARATION FORMS –** All bidders must complete the Bidder Declaration GSPD-05-105 and include it with the bid response. When completing the declaration, bidders must identify all subcontractors proposed for participation in the contract. Bidders awarded a contract are contractually obligated to use the subcontractors for the corresponding work identified unless the State agrees to a substitution and it is incorporated by amendment to the contract.

Bidders who have been certified by California as a DVBE (or who are bidding rental equipment and have obtained the participation of subcontractors certified by California as a DVBE) must also submit a completed form(s) STD. 843 (Disabled Veteran Business Enterprise Declaration). All disabled veteran owners and disabled veteran managers of the DVBE(s) must sign the form(s). Should the form not be included with the solicitation, contact the State contracting official or obtain a copy online from the Department of General Services Procurement Division, Office of Small Business and DVBE Services (OSDS) website at www.pd.dgs.ca.gov/smbus. The completed form should be included with the bid response.

16. At the State’s option prior to award, bidders may be required to submit additional written clarifying information. Failure to submit the required written information as specified may be grounds for bid rejection.

17. Contract formation
Bidder's must return 4 signed copies of the contract that is comprised of the following:

a Download the Standard Agreement for IT Goods/Services Only (STD 213) from the following the website.

<http://www.documents.dgs.ca.gov/pd/modellang/std-213.pdf>

b In Section 1, insert "*name of department*" as the State Agency and the bidder's name on the appropriate lines.

c Leave Section 2 and 3 blank.

d In Section 4 of this document, insert the following:

- **Statement of Work**

- **IT General Provisions (Revised and effective on 10/03/2005)**

- <http://www.pd.dgs.ca.gov/modellang/GeneralProvisions.htm>

- **Other provisions as applicable**

- **RFQ-ITS XXXX and Contractor's bid response are hereby incorporated and made a part of this contract.**

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e At the bottom of the STD 213 For IT Goods and Services Only, complete the information in the "Contractor" section as appropriate and the following information for the Agency Name, Printed Name and Title and Address, respectively:

Department Name

Name/Title of Department Official

Address, Sacramento, CA 95812-1486

II. Evaluation Information

A. Evaluation Process – *Departments may choose to evaluate this RFQ on lowest cost or value effective methodology as outlined below. If lowest cost is chosen, modify paragraphs B.2., 3. and C below to delete references to scoring.*

Each RFQ-ITS response will be checked for the presence of requirement information in conformance with the submission requirements of this RFQ-ITS. The department will evaluate each RFQ-ITS response to determine its responsiveness to the requirements.

B. Evaluation Criteria

The overall responsiveness of each RFQ-ITS response is based on the complete response from the bidder to the RFQ-ITS requirements, including the statement of work for the project. The following three sub-sections and criteria will be reviewed by the State's evaluation team.

1. Administrative Requirements Evaluation Criteria (Pass/Fail)

Example:

	Requirement	Yes	No	N/A
a.	Cover Letter			
b.	Statement of Work			
d.	Customer References from previous projects that are similar in nature to the work outlined in the RFQ-ITS			
e.	Signed Confidentiality Statements			
f.	Bidder Declarations			
g.	List of Subcontractors			
h.	All other Administrative requirements, i.e., DVBE, TACPA, etc.			

2. Technical Requirements Evaluation Criteria (50 points or other points as determined by the department. Points can be detailed by requirement.)

For a RFQ-ITS that is not related to personal services such as in this example, but rather on functional requirements the following is a suggestion of how those functional requirements could be worded

Suggested functional requirements shown below are “mandatory (M) and scoreable (S), for example,

- M 1. (# of pts) The time to print the document with the applicant's data cannot exceed 30 seconds to be received at a requestor's workstation. The contractor's system that minimizes the time to print a receipt will receive the most points.
- M 2. (# of pts) The contractor's system must not interrupt the host site's data processing activities. The contractor's system with the least disruption will receive the most points.
- M 3. (# of pts) The response time from document request receipt to image response at the requestor's workstation cannot exceed 10 seconds. The contractor's system with the fewest seconds to response will receive the most points.

Departments will want to assure themselves that these types of functional requirements can be met. This can be done by requiring bidders to supply customer references that can confirm that the bidder can meet the requirement and by assuring that the Acceptance criteria will assure the State that these requirements are met before accepting invoices for payment. In addition, the department will want to require the bidder to provide company literature that states compliance with the requirements.

- 3. Cost (50 points or other as determined by the department, however generally cost is 50% of the evaluation).
The cost for this RFQ-ITS is weighted at 50% of the total points available. The contractor will be evaluated on the total extended cost for both the contracted term and including any optional extension years.

C. Scoring

- 1. Administrative (Pass/Fail)
The administrative evaluation criteria will be scored pass/fail.
- 2. Technical (50 points)
The technical evaluation criteria will be scored on a scale of 0 through 10, with 0 being “does not meet the requirement” and 10 being “exceeds the requirement”.
- 3. Cost (50 points)
Each bidders cost score will be calculated based on the ratio of the lowest cost proposal to the bidders cost, multiplied by the maximum number of cost points available (50), as shown in the calculation below:

$$\frac{\text{Lowest Total Cost Bid}}{\text{Bidder Total Cost}} \times \text{Total cost points available}$$

Example: To help illustrate this process, refer to table below, for an example of the cost score calculation process. **Cost figures in the example below explain the calculations and have no other significance.**

Cost Evaluation and Scoring Methodology Example

Bidder	Grand Total Cost	Calculation	Cost Points Awarded
A	\$400,000	$\frac{\$300,000}{\$400,000} \times 50$	38
B	\$350,000	$\frac{\$300,000}{\$350,000} \times 50$	43
C	\$300,000	$\frac{\$300,000}{\$300,000} \times 50$	50

4. Final Scoring Methodology

Bidder	Technical Score	Cost Score	Total Points Awarded
A	42	38	80
B	38	43	81
C	46	50	96

In this case the highest scored proposal from Bidder C would be the intended awardee.

III. Statement of Work

This Statement of Work (SOW) reflects the services to be provided by the Contractor for XXXXXX department. The Contractor is to provide personnel to assume specific positions as described in this SOW, which provides (*describe services*) for the (*name of project*).

(Summarized below is a suggested outline of this SOW as requirements to be met by a Contractor providing a proposal to this RFQ-ITS. Each department will modify this outline to suit their particular need and type of service. The outline below supposes that the RFQ-S is for personal services.)

- A. Overview
- B. Independent Oversight (or other type) Activities
 - 1. Review and Assessment (*what is it that the Contractor must review*)
 - 2. Reporting (*what reports are required and in what manner are they to be provided*)
 - 3. Tracking (*how will the Contractor track progress to prove outcomes required by department*)
- C. Contractor and Tasks and Responsibilities
 - 1. Review and Assessment (*how often will the department require a review/assessment to take place*)
 - 2. Independent Project Oversight Reporting (*how often is the Contractor required to report on progress and in what manner are they to provide it*)
 - 3. Project Tracking (*specific requirements for the Contractor to provide tracking of progress to the department*)
 - 4. Risk Assessment and Reporting
 - 5. Meetings
- D. Deliverables
- E. Staffing
- F. Rates – See Attachment 2, Exhibit B – Budget Detail

G. Contractor and Staff Qualifications

1. Contractor Qualifications

2. Staff Qualifications

a. Project Manager (list requirements)

b. Project Analyst (or other required position title and list requirements)

H. Unanticipated Tasks (this is where the language goes for an increase by 10% over the contract value for truly unanticipated tasks. Contact PAMS for language.)

I. Acceptance Criteria (these are those things that will be considered for the department to accept the deliverable from the Contractor is being complete and thus acceptable for payment. Also include language for how the deliverables are to be presented and if not acceptable that it must be in writing and must be mitigated prior to payment by the State.)

J. Travel (show what will and what will not be paid for by the State)

K. State Responsibilities (list those things the state will provide such as access to documents, workspace, phones and system access)

L. State holiday Schedule

M. Conflicts of Interest

N. Payment Provisions

Attachment 1 – Cover Sheet

The submission of this quote does not obligate the *(insert department name)* to fund the proposed contract. If the quote is approved for funding, a contract will be executed between the State of California and the bidder. When funding is authorized, the bidder will be expected to adhere to the terms of the executed contract.

The undersigned bidder hereby proposes to furnish all labor, materials, tools and equipment, to provide services in accordance with the specifications and provisions received with the RFQ-ITS.

1. Full Legal Name of Bidder's Organization:

2. Mailing Address:

Street City State Zip

Telephone FAX Email

3. Federal Taxpayer Identification Number: _____

4. Principal who is authorized to bind the bidder:

Typed Name Title

Original Signature Date

5. Bidder's contact person shall be: _____
(Name and Phone Number)

Attachment 2 – Cost Sheet

1.

Cost per Transaction	Estimated # of Transactions		Extension
FY 05/06		X	
FY 06/07			

Total Contracted \$\$ FY 05 thru 07 _____

2. Optional Contract Extension Rates (should the state opt to extend the contract)

Cost per Transaction	Estimated # of Transactions		Extension
FY 07/08		X	

Total Optional \$\$ _____

3. Grand Total Cost

Enter Cost from #1 above \$ _____

+

Enter Cost from #2 above \$ _____

Grand Total Cost for Evaluation \$\$ =

Attachment 3 – Customer Experience Reference Form

The bidder must provide (two) client references for services it has performed within the past (3) years that are similar in size, scope, and type of service as specified in this RFQ-ITS. Complete this form for each corporate reference.

Bidder's Name:
Subcontractor that provided the services (if other than the bidder):
Company/Organization:
Contact:
Address:
Telephone:
Fax:
E-mail:
Project Name and/or Description:
Bidder or Subcontractor's involvement:
Start Date (mm/dd/yyyy):
End Date (mm/dd/yyyy):
Project Dollar Amount:
Describe corporate experience for this project as it relates to the RFQ-S Corporate Experience Requirements for this category. The description of the project must be detailed and comprehensive enough to permit the State to assess the similarity of those projects to the work anticipated in the award of the contract resulting from this procurement.

Attachment 5 – Payee Data Record, STD. 204

The successful bidder as a result of this RFQ-ITS will be required to sign the Payee Data Record, STD. 204, before contract award. Refer to the following website link for more details:

<http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf>

State of California
Department of _____

Attachment 6 - California Disabled Veteran Business Enterprise Program Requirement Packet

The Contractor's response to this solicitation must contain the completed forms depending on the option chosen for DVBE participation.

http://www.documents.dgs.ca.gov/pd/poliproc/Master-DVBEIncentiveRequireGoodIT11_1215.pdf

Attachment 7 – Bidder Declaration Form

All Contractors must complete the Bidder Declaration GSPD-05-105 and include it with the bid response.

<http://www.documents.dgs.ca.gov/pd/poliproc/MASTER-BidDeclar08-09.pdf>

BIDDER DECLARATION FORM GSPD-05-105

<http://www.documents.dgs.ca.gov/pd/poliproc/MASTER-BidDeclar08-09.pdf>