NCB DOCUMENTATION REQUIREMENTS

(Revision Date 10/04/2024)

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NON-IT SERVICES

1. STD. 821

2. STD. 213

3. STD. 215

4. Draft Statement of Work (SOW) (include all attachments, exhibits, and line-item budget details)

5. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing)

AMENDMENTS (In addition to the items above, add the items in the is for all amendment-related NCBs.)

1. Fully executed agreements (i.e., original agreement, previous amendments)

2. SOW (follow the amendment format using strikethrough and bold/underlines)

Expenditures to date

NON-IT GOODS

1. Final draft purchase document (i.e., Std. 65, Fi$cal agreement, etc.). (unsigned)

2. Draft Statement of Work (SOW) (include all attachments, exhibits, and line-item budget details)

3. Quote for goods (Current within 90 days of NCB request)

4. Sole Source Letter

5. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing

IT SERVICES

1. SIMM 71B

2. CDT Project Delegation (Broadcast Bulletin P-10-18)

3. IT Procurement Authority Questionnaire (DGS will provide upon submission of NCB)

4. STD. 821

5. STD. 213

6. STD. 215

7. Draft Statement of Work (SOW) (include all attachments, exhibits, and line-item budget details)

8. Quote for services (Current within 90 days of NCB request)

9. Sole Source Letter (If applicable)

10. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing)

AMENDMENTS (In addition to the items above, add the items in the is for all amendment-related NCBs.)

1. Fully executed agreements (i.e., original agreement, previous amendments)

2. SOW (follow the amendment format using strikethrough and bold/underlines)

3. Expenditures to date

IT GOODS

1. SIMM 71B

2. CDT Project Delegation (Broadcast Bulletin P-10-18)

3. IT Procurement Authority Questionnaire (DGS will provide upon submission of NCB)

4. Final draft purchase document (i.e., STD. 65, Fi$cal agreement, etc.). (unsigned)

5. Draft Statement of Work (SOW) (include all attachments and exhibits)

6. Quote for goods (Current within 90 days of NCB request)

7. Sole Source Letter

8. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing)

IT GOODS & SERVICES

1. SIMM 71B

2. CDT Project Delegation (Broadcast Bulletin P-10-18)

3. IT Procurement Authority Questionnaire (DGS will provide upon submission of NCB)

4. STD. 821

5. STD. 213

6. STD. 215

7. Draft Statement of Work (SOW) (include all attachments and exhibits)

8. Quote for goods and services (Current within 90 days of NCB request)

9. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing)

AMENDMENTS (In addition to the items above, add the items in the is for all amendment-related NCBs.)

1. Fully executed agreements (i.e., original agreement, previous amendments)

2. SOW (follow the amendment format using strikethrough and bold/underlines)

3. Expenditures to date

LTB DOCUMENTATION REQUIREMENTS

1. Final draft purchase document (i.e., Std. 65, Fi$cal agreement, etc.). (unsigned)

2. Draft Statement of Work (SOW) (include all attachments and exhibits)

3. Quotes (at least 2) that shows competition exists (Current within 90 days of NCB request)

4. LTB Worksheet (https://www.dgs.ca.gov/~/media/Divisions/PD/Acquisitions/Solicitation-Document-Attachments/LTB-Worksheet102213-ADA.docx)

**LIMIT TO BRAND (LTB) WORKSHEET**

State Department Name Contact Person Phone # Date Prepared Product Description Brand/Model

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Unique Performance Factors** | **Product Name:** | **Product Name:** | **Product Name:** | **Product Name:** | **Product Name:** | **Product Name:** | **Suppliers Product Meets Unique Performance Factors**  |
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Why are these specific factors required?

What other products have been examined and rejected, and why?

SPECIAL CATEGORY REQUEST

1. Services

a. STD. 821

b. STD. 213

c. STD. 215

2. Goods

a. Final draft purchase document (i.e., Std. 65, Fi$cal agreement, etc.). (unsigned)

3. Draft Statement of Work (SOW) (include all attachments, exhibits, and line-item budget details)

4. Quote for goods (Current within 90 days of NCB request)

5. Cost Reasonableness (Provide documentation validating cost reasonableness. See SCM 1510 (https://www.dgs.ca.gov/PD/Resources/SCM/TOC/15/15-10) for guidance on how to determine Fair and Reasonable Pricing)