



BETTY T. YEE
California State Controller

December 2, 2021

REQUEST FOR QUOTE for INFORMATION TECHNOLOGY SERVICES EINF71721

PLANVIEW PROJECT PORTFOLIO MANAGEMENT (PPM) PRO FULL USER LICENSES AND SUPPORT

Bidders are invited to review and respond to the State Controller's Office (SCO) Request for Quote for Information Technology (IT) Services (RFQ-ITS). To submit a bid for these services, the Bidder must comply with the instructions contained in this document as well as the requirements stated in Sample Contract, Exhibit A, Scope of Work. By submitting a bid, the bidding firm agrees to the terms and conditions stated in this RFQ-ITS.

Read the attached document carefully. The Bidder is solely responsible for ensuring that the full bid is received by SCO in accordance with the bid requirements, prior to the date and time specified in the solicitation. SCO shall not be responsible for any delays in submittal, to include misdelivery. Bids received after the specified deadline will not be considered for review. SCO reserves the right to cancel this RFQ-ITS without cause, at any time prior to award.

Bidders are advised to check the Cal eProcure website for addendums, modifications, and updates to the bid documents. SCO is not responsible for failure of the prospective bidder to check for any bid document updates, changes, or answers to questions posted on Cal eProcure. Failure to check the website periodically will be at the bidder's sole risk.

If a discrepancy occurs between the information in the advertisement appearing on the Department of General Services, California State Contracts Register (CSCR) on the Cal eProcure website: <https://caleprocure.ca.gov/pages/index.aspx>, and the information in the herein RFQ-ITS, the information in the attached RFQ-ITS shall take precedence.

Note that all Information Technology (IT) contracts entered into with the State of California will include by reference IT General Provisions (DGS PD 401IT) that may be viewed and downloaded at internet site <https://www.dgs.ca.gov/-/media/Divisions/PD/PTCS/OPPL/Model-Language/IT/ITGeneralProvisions11192021.docx?la=en&hash=1333CDCE673BA36829779048AF8B233AF70081BE>. If you do not have internet access, a hard copy can be provided.

Exhibit C, Cloud Computing-Software as a Service (SaaS), shall be incorporated by reference only and made part of the Contract as if attached hereto.

Cloud Computing-SaaS may be viewed and downloaded at Internet site https://www.dgs.ca.gov/-/media/Divisions/PD/PTCS/OPPL/Model-Language/CLOUDCOMPUTING_SaaS/SGP11192021.pdf?la=en&hash=13820BD4DA66DB6A8A17D19BC17BC66C724D5046. If you do not have Internet access, a hard copy can be provided.

The Bidder is solely responsible for ensuring that the full bid is received by SCO in accordance with the RFQ requirements prior to the date and time specified in the solicitation, and in the manner specified. SCO shall not be responsible for any delays by transmission errors or misdelivery. Bids received after the time stated will be considered non-responsive. Additional Bidder Instructions (DGS PD 451) may be viewed and downloaded from the following site:

<https://www.dgs.ca.gov/PD/Forms?search=GSPD%20451&topicCategoryFilters=&audienceCategoryFilters=&sort=relevance&activeFilters=&page=1>. If you do not have Internet access, a hard copy can be provided.

In the opinion of SCO, this RFQ-ITS is complete and without need of explanation. However, if you have questions, or should you need any clarifying information, please send an email to SCOITProcurement@sco.ca.gov by the Written Questions Submittal Deadline in Section I, General Information, Item B. Key Action Dates.

Please note that no verbal information given will be binding upon SCO unless such information is issued in writing through an official addendum.

BIDDERS SHOULD REVIEW AND CORRECT ALL ERRORS. BIDDERS MUST CONFIRM COMPLIANCE WITH THE RFQ-ITS REQUIREMENTS PRIOR TO SUBMITTING A BID.

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Sample Contract

- Exhibit A – Scope of Work
- Exhibit B – Budget Detail and Payment Provisions
- Exhibit B – Attachment 1, Cost Worksheet
- Exhibit C – IT General Provisions (DGS PD-401 IT)/Cloud Computing-SaaS
- Exhibit D – Special Terms and Conditions

*Submit only if applicable.

SECTION I. GENERAL INFORMATION

A. Description of Services

The State Controller's Office (SCO) is seeking a contractor to provide Planview Project Portfolio Management (PPM) Pro Software as a Service (SaaS) License and Support.

Contract Term

The term of this contract will be for three years with the option to amend to add and/or delete licenses and add funds as deemed necessary by SCO. Additional licenses will be co-termed to the end of the annual license term. The rates quoted on Attachment 12, Cost Worksheet will not change as a result of any amendment to this contract. This contract may be terminated by SCO with 30 days' written notice to the Contractor.

Contractors are cautioned that no work shall begin until the Contract has been fully executed. If work is performed prior to contract approval, and the Contract for any reason is not approved, all previous work performed by the Contractor is considered donated to SCO and no payment shall be made for that work.

Contract Amount

The Contractor and the SCO Project Manager (PM) are responsible for monitoring the Contract cost to ensure it does not exceed the maximum of the Contract without an executed amendment.

B. Key Action Dates

It must be understood that time is always of the essence, both for the RFQ-ITS submittal and for contract completion. Bidders are advised of the key action dates and times shown below and are expected to adhere to them.

EVENT	DATE
Release of RFQ-ITS	December 2, 2021
Written Questions Submittal Deadline	December 10, 2021: 2:00 PM PT
SCO Response to Written Questions	December 13, 2021
Final Date for Bid Submission*	December 17, 2021: 2:00 PM PT
Evaluation of Bids	December 20-21, 2021
Notice of Intent to Award	December 22, 2021
Anticipated Contract Award Date	December 30, 2021
Anticipated Contract Start Date	January 2022

* Dates after the Final Date for Bid Submission are estimates only and may be subject to change. SCO will adhere to the listed dates as strictly as possible, but will not be held accountable for changes due to unforeseen circumstances.

C. Written Questions and Answers

1. Bidders may submit questions for clarification of the content of this RFQ-ITS to SCOITProcurement@sco.ca.gov.
2. Questions must be received by the date and time specified in Section I. General Information, Item B. Key Action Dates. Questions and answers will be provided without identifying the submitter. At the sole discretion of SCO, questions may be paraphrased by SCO for clarity.

3. The subject line of the email should read, *RFQ-ITS EINF71721 Questions – Company Name*.
4. The Bidder must reference the section and page number about which they are inquiring.
5. Questions and answers will be provided without identifying the submitter. At the sole discretion of SCO, questions may be paraphrased by SCO for clarity.
6. Questions not submitted in writing by the date for Written Questions Submittal Deadline specified in Section I. General Information, Item B. Key Action Dates will be answered at SCO option.
7. Questions and Answers will be issued via an addendum to this RFQ-ITS and be posted to Cal eProcure by the date specified in Section I. General Information, Item B. Key Action Dates.

D. RFQ-ITS Bid Guidelines

1. It is the bidder's responsibility to provide all necessary information for SCO to evaluate the Bid, verify requested information, and determine the bidder's ability to perform the services defined in Sample Contract, Exhibit A, Scope of Work and Attachment 12, Cost Worksheet.
2. Bidders who are Department of General Services (DGS) certified California Small Businesses (SB), Micro Businesses (MB) and/or Disabled Veteran Business Enterprises (DVBE) must provide and include an SB/DVBE Certification with the Bid. SCO will verify that SB/DVBE certifications are valid at the time the Bid is due. In accordance with California Government Code (GC) Section 14837(d) and California Military and Veterans Code (M&VC) Section 999, all SB and DVBE contractors, subcontractors, and suppliers that bid on or participate in a State contract, regardless of being an oral or written solicitation, shall perform a *Commercially Useful Function* (CUF).
3. The Bidder may modify a bid after its submission by withdrawing its original bid and resubmitting a new bid prior to the Final Date for Bid Submission. Contractor modifications in any other manner, oral or written, will not be considered.
4. The Bidder may withdraw its bid by submitting a written withdrawal request to SCOITProcurement@sco.ca.gov, signed by the Bidder or an authorized agent. A bidder may thereafter submit a new bid prior to the Final Date for Bid Submission. Bids may not be withdrawn without cause after the Final Date for Bid Submission.
5. SCO does not accept alternate contract language from a prospective contractor. A bid with such language may be considered a counter offer and will not be considered. The State's Terms and Conditions are not negotiable.
6. Bids should provide straightforward and concise descriptions of the bidder's ability to satisfy the requirements of this RFQ-ITS. Omissions, inaccuracies, or misstatements will be cause for rejection of a bid.
7. SCO may modify the RFQ-ITS by issuing an addendum, prior to the Final Date for Bid Submission, which will be posted to Cal eProcure.
8. SCO reserves the right to reject all bids. SCO is not required to award a contract.
9. At SCO 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.

10. No oral understanding or agreement shall be binding on either party.

E. RFQ-ITS Bid Content

In order to be responsive to this RFQ-ITS, the following requirements must be met. Failure to respond to and submit these items with the required information may result in disqualification.

This requirement is Mandatory Pass/Fail.

1. Administrative Requirements

- a. Completion of all required Attachments listed on Attachment 1, Required Attachment Checklist.
- b. On Attachment 2, Bidder Certification Sheet, the Bidder must complete, sign, and return the Attachment. The Bidder will include any necessary supporting documentation (certifications, licenses, insurance acknowledgement, etc.) necessary to validate the bidder's qualifications.

Attachment 2 must be signed by an individual authorized to bind the business contractually and must identify the title or position that the individual holds in the business.

2. Cost Worksheet

F. RFQ-ITS Bid Submission

1. Bidders must submit their bids in PDF attached to an email to SCOITProcurement@sco.ca.gov by the date and time specified in in Section I. General Information, Item B. Key Action Dates. Subject line must include the RFQ-ITS number and Title.

2. Email Requirements

- Bidders must ensure that emails do not exceed a file size of 20 megabytes.
- Bidders must ensure that emails do not contain scripts, executable files, or macros, which may make their emails undeliverable.
- Do not imbed links within the PDF—all documents must be contained within the PDF. SCO cannot access links to external sources. Bids containing links to external sources will be rejected.
- If the email, identified as *BID*, should exceed acceptable file size, the Bidder shall split the email into multiple emails to ensure delivery.
- **LATE BID SUBMISSIONS WILL NOT BE ACCEPTED – NO EXCEPTIONS.**

3. Bids shall provide straightforward and concise descriptions of the bidder's ability to satisfy the requirements of this RFQ-ITS. The Bid must be complete and accurate. Omissions, inaccuracies, or misstatements will be sufficient causes for rejection of the Bid.
4. If the Bid is made under a fictitious name or business title, the actual legal name of the Bidder must be provided.
5. All bids shall include the documents identified on Attachment 1, Required Attachment Checklist. All attachments must include the information stated, and as instructed on each of the attachments (if applicable). Bids not including the proper required attachments shall be deemed nonresponsive. A

nonresponsive bid is one that does not meet the basic bid requirements.

6. Bids must be submitted for the performance of all services described herein. Any deviation from the work specifications will not be considered and the Bid will be rejected.
7. A bid may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. SCO may reject any or all bids and may waive any immaterial deviation in a bid. SCO waiver of an immaterial deviation shall in no way modify the RFQ-ITS document or excuse the Bidder from full compliance with all requirements if awarded the Contract.
8. All documents contained in the Bid requiring a signature must bear the original signature of a person authorized to bind the bidder's firm contractually. Due to COVID-19, electronic signatures will be accepted.
9. An error in the Bid may cause the rejection of the Bid; however, SCO may at its sole option correct obvious calculation errors. If corrected, the Bidder will be provided the correction for validation.

G. Participation, Preference and Incentive Programs

The Preference and Incentive Programs listed below may be combined, but will not exceed a combined total of 15 percent of the Bid amount or \$100,000 per bid, whichever is less. No bid price will be reduced by more than \$100,000, and all preference and incentive cost adjustments are for bid evaluation purposes only and do not alter the actual cost offered by the Bidder.

A SB/MB and a DVBE must have current and valid certification through the Department of General Services (DGS), Office of Small Business and Disabled Veteran Business Enterprise Certification Services (OSDS). Completed certification applications and required support documents must be submitted to OSDS no later than 5:00 PM PT on the Final Date for Bid Submission and OSDS must be able to approve the application as submitted.

For certification and preference approval process information, contact OSDS by telephone at (916) 375-4940 or access OSDS Internet website at <https://www.dgs.ca.gov/PD/About/Page-Content/PD-Branch-Intro-Accordion-List/Office-of-Small-Business-and-Disabled-Veteran-Business-Enterprise/Certification-Program>.

1. Disabled Veteran Business Enterprise Program

The DVBE Participation Program requirements for this solicitation have been waived. However, SCO is committed to achieving legislatively established goals for the participation of DVBEs and seeks to use certified DVBE business whenever possible. Therefore, SCO requests the Bidder's voluntary participation in reporting any certified DVBEs that will be used in the performance of this contract. Each listed certified DVBE must perform a CUF in the performance of the Contract as defined in Government Code Section 14837(d)(4).

2. Disabled Veteran Business Enterprise Incentive

Firms that are DVBEs or are voluntarily utilizing DVBE subcontractors can have an incentive applied based on their level of DVBE participation identified in the Bid, not to exceed five percent. The DVBE Incentive is for bid computation purposes only and is only applied to responsive bids from responsible bidders proposing DVBE participation.

The incentive shall be applied as follows:

Confirmed DVBE participation of:	Incentive Applied
5.0% or more	5%
4.5% to 4.99%	4%
4.0% to 4.49%	3%
3.5% to 3.99%	2%
3.01% to 3.49%	1%

- a. The incentive is subject to a minimum of one percent and a maximum of five percent of the available cost points. Bids with DVBE participation of more than five percent will be calculated with a five percent incentive.
- b. The DVBE Incentive is computed from the lowest responsive and responsible bid price.
- c. If the awarded contractor has a certified DVBE perform an element of work for the Contract, within 60 days of expiration of the Contract, the awarded contractor shall complete and submit to SCO a [Prime Contractor's DVBE Subcontracting Report \(ca.gov\)](#) (STD. 817)).
- d. The required list of California certified DVBE subcontracts must be provided on Attachment 5, Bidder Declaration (Written) (GSPD-05-105) and must include the following: 1) subcontractor name, 2) address, 3) phone number, 4) a description of the work to be performed and/or products supplied, 5) and the dollar amount or percentage of the net bid price (as specified in the solicitation) per subcontractor.

3. Small Business Preference Program

Current law encourages state departments to first consider a SB/MB Enterprise for contracting opportunities. SCO is committed to supporting SB/MB participation in state contracting and seeks to use certified SBs/MBs whenever possible.

Section 14835, et seq., of the California GC requires that a five percent preference be given to bidders who certify as a SB/MB. The rules and regulations of this law are contained in Title 2, California Code of Regulations, Section 1896, et seq. A copy of the regulation is available upon request.

The SB/MB Preference may not exceed \$50,000 for any bid. This preference cost adjustment is for bid evaluation purposes only and does not alter the actual cost offered by the Bidder.

4. Non-Small Business Preference Request

A five percent bid preference is available to a non-small business claiming 25 percent California certified SB subcontractor participation. If claiming the non-small business subcontractor preference, the Bid must include a list of the SB(s) with which you commit to subcontract in an amount of at least 25 percent of the net bid price with one or more California certified SBs. Each listed certified SB must perform a CUF in the performance of the Contract as defined in GC Section 14837(d)(4).

The required list of California certified SB subcontracts must be provided on Attachment 5, Bidder Declaration (Written) (GSPD-05-105) and must include the following: 1) subcontractor name, 2) address, 3) phone number, 4) a description of the work to be performed and/or products supplied, 5) and the dollar amount or percentage of the net bid price (as specified in the solicitation) per subcontractor.

In granting the Non-Small Business Preference, no bid price will be reduced by more than \$50,000. This preference cost adjustment is for bid evaluation purposes only and does not alter the actual cost offered by the Bidder.

A non-small business is defined as a responsive/responsible bidder that is not certified by the DGS OSDS as a SB/MB enterprise.

H. Award and Protest

1. Whenever a contract is awarded under a procedure that provides for competitive bidding but the Contract is not to be awarded to the low Bidder, the low Bidder shall be notified by email five working days prior to the award of the Contract.
2. Notice of the proposed award shall be posted for five working days prior to awarding the Contract in a public place at SCO, 300 Capitol Mall, 15th Floor, Sacramento, CA 95814, and on the Small Business and Disabled Veteran Business Enterprises Advocate and Liaison page on SCO Website under *Notice of Intent to Award Contract* at: https://www.sco.ca.gov/sco_sb_dvbe_advocate.html.
3. If any bidder, prior to the award of the Contract, files a written protest with SCO and the DGS, Office of Legal Services, 707 Third Street, 7th Floor, Suite 7-330, West Sacramento, CA 95605, on the grounds that the protesting bidder is the lowest responsive responsible bidder, the Contract shall not be awarded until either the protest has been withdrawn or DGS has decided the matter.
4. Within five days after filing the protest, the protesting bidder shall file with DGS, Office of Legal Services and SCO, a detailed written statement specifying the grounds for the protest. The written protest must be sent to DGS, Office of Legal Services, 707 Third Street, 7th Floor, Suite 7-330, West Sacramento, CA 95605. A copy of the detailed written statement must be emailed to SCO, at SCOITProcurement@sco.ca.gov, Attention: SCO IT Procurement.

SECTION II. EVALUATION INFORMATION

A. Evaluation Process

Each bid will be checked for the presence of required information in conformance with the submission requirements of this RFQ-ITS. SCO evaluation team will evaluate each bid to determine its responsiveness to the requirements. The Bid must meet all of the evaluation criteria identified in Section B. Evaluation Criteria below. If a bid is missing required information, it may be deemed not responsive and subject to disqualification. Further review is subject to SCO discretion.

Award of a contract resulting from this RFQ-ITS will be to the responsive, responsible bidder with the lowest bid after application of any preference requirements or incentives as applicable.

B. Evaluation Criteria

The overall responsiveness of each bid is based on the complete bid from the Bidder to the RFQ-ITS requirements. The following three subsections and criteria will be reviewed by the State's evaluation team:

1. Administrative Requirements (Pass/Fail)

Bids will first be reviewed for responsiveness to the Administrative Requirements identified below, to include all required attachments listed on Attachment 1, Required Attachment Checklist. If a bid is missing information required in the Administrative Requirements, it may be deemed nonresponsive, and therefore will be ineligible for further consideration.

Description	Pass	Fail
ADMINISTRATIVE REQUIREMENTS		
Bid received by date/time specified in Key Action Dates		
Bid email received in PDF format		
Attachment 1, Required Attachment(s) Checklist and all required/applicable attachments listed on it received		
COST		
PARTICIPATION, PREFERENCE AND INCENTIVE PROGRAMS, AS APPLICABLE		
Small Business Preference	TBD Upon evaluation	
DVBE Incentive	TBD Upon evaluation	
Non-Small Business Preference		
Total Preference and/or Incentive		
Total Summary	Calculated Cost	
Cost*		

*After application of Preference and Incentive

C. Tie Break Process

In the event of a precise tie, if GC Section 14838(f) does not apply to the Bidders, a witnessed drawing of bidder names will be conducted by the Procurement Official. If a drawing of bidder name is needed, the Procurement Official will schedule and arrange for the drawing and non-partisan witnesses; notifying the participating Bidders of the outcome of the drawing.

ATTACHMENT 1
REQUIRED ATTACHMENT CHECKLIST

Bidder's Name: _____

(Please print clearly or type)

A complete bid will consist of the items identified below. Complete this checklist to confirm the items in your bid. Place a check mark or X next to each item that you are submitting to SCO. For your bid to be responsive, all required attachments must be returned. Further review is subject to SCO discretion. This checklist should also be returned with your bid package.

Requirement	Description	Submitted to SCO
Attachment 1	Required Attachment Checklist	
Attachment 2	Bidder Certification Sheet	
Attachment 3	Contractor Point of Contact	
Attachment 4	Payee Data Record (STD 204) and Payee Data Record Supplement (STD 215)*	
Attachment 5	Bidder Declaration (Written) (GSPD-05-105)	
Attachment 6	Disabled Veteran Business Enterprise (DVBE) Declarations (DGS PD 843)*	
Attachment 7	Bidding Preferences and Incentives	
Attachment 8	Acknowledgement of Contract Exhibits and Policies	
Attachment 9	California Civil Rights Laws Certification (DGS OLS 04)	
Attachment 10	Contractor/Consultant Confidentiality and Non-Disclosure Acknowledgement (ISO-004b)	
Attachment 11	Contractor/Consultant Organization Information Security Agreement (ISO-004c)	
Attachment 12	Cost Worksheet	
Additional Requirement	California Certified Small/Micro Business and/or DVBE Certification*	

* Only submit if applicable.

Authorized Signature and Title

Date

**ATTACHMENT 2
BIDDER CERTIFICATION SHEET**

Bidder's Name: _____

(Please print clearly or type)

Complete and return this attachment with the Bid package. An individual who is authorized to bind the Bidding firm contractually shall sign the RFQ-ITS Attachment 2, Bidder Certification Sheet. The signature must indicate the title or position that the individual holds in the firm. An unsigned bid may be rejected.

1. Our all-inclusive cost is submitted as detailed in Attachment 12, Cost Worksheet.
2. All required attachments are included with this certification sheet.
3. The signature affixed hereon and dated certifies compliance with all the requirements of this bid document. The signature below authorizes the verification of this certification.

1. Company Name	2. Telephone Number ()	2a. Fax Number ()
3. Address		
Indicate your organization type: 4. <input type="checkbox"/> Sole Proprietorship 5. <input type="checkbox"/> Partnership 6. <input type="checkbox"/> Corporation		
Indicate the applicable employee and/or corporation number: 7. Federal Employee ID No. (FEIN) 8. California Corporation No.		
9. Indicate applicable license and/or certification information:		
10. Bidder's Name (Print)	11. Title	
12. Signature	13. Date	
<div>14. Are you certified with the Department of General Services, Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS) as: a. California Small Business Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, enter certification number: _____ b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, enter your certification number below: _____</div> <div>NOTE: A copy of your Certification is required to be included if either of the above items is checked Yes. Date application was submitted to OSDS, if an application is pending:</div>		

**ATTACHMENT 3
CONTRACTOR POINT OF CONTACT**

Bidder's Name: _____

(Please print clearly or type)

Complete and return this attachment with the Bid.

The contact person regarding this RFQ-ITS is:			
Name & Title:			
Address:			
Phone Number:		Fax Number	
Cell Phone Number: (optional)		Email:	
If awarded a contract, the Project Manager for services will be:			
Name & Title:			
Address:			
Phone Number:		Fax Number	
Cell Phone Number: (optional)		Email:	
If awarded a contract, direct all contract inquiries to:			
Name & Title:			
Address:			
Phone Number:		Fax Number	
Cell Phone Number: (optional)		Email:	
If awarded a contract, the name of the company officer authorized to sign the Contract is:			
Name & Title:			
Address:			

ATTACHMENT 4
PAYEE DATA RECORD (STD 204) AND PAYEE DATA RECORD SUPPLEMENT (STD 205)*

The fill and print form is available at the following link:

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

*Only use Payee Data Record Supplement (STD 205) to provide a remittance address if different from the mailing address for information returns, or to make subsequent changes to the remittance address

<https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std205.pdf>

ATTACHMENT 5
BIDDER DECLARATION (Written) (GSPD-05-105)

All bidders must complete the Bidder Declaration GSPD-05-105 and include it with the Bid. 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 SCO agrees to a substitution and it is incorporated by amendment to the Contract.

<https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf>.

ATTACHMENT 6
DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) DECLARATIONS (DGS PD 843)*

The fill and print form is available at the following link:

https://www.documents.dgs.ca.gov/dgs/fmc/gspd/pd_843.pdf

*Submit only if applicable.

NOTE: The fill and print forms are available at the links provided. Please email SCOITProcurement@sco.ca.gov if you are unable to access the provided links.

**ATTACHMENT 7
BIDDING PREFERENCES AND INCENTIVES**

THE BIDDER MUST COMPLETE ALL SECTIONS BELOW AND SUBMIT WITH ITS BID.

1. SMALL BUSINESS PREFERENCE:

Bidder must check the appropriate box from the choices below.

- ☐ I am a DGS certified Small Business and claim the Small Business Preference.
My DGS Small Business certification number is: _____
- ☐ I am not a DGS certified Small Business, but 25% or more of the revenue from the award will go to DGS certified Small Business subcontractors performing a Commercially Useful Function and therefore I am claiming the preference.

Bidder must complete and submit Attachment 5: GSPD-05-105 Bidder Declaration (Written), indicating the percentage of the revenue that will be received by each DGS certified Small Business subcontractor.

- ☐ I am not claiming the DGS Small Business Preference.

2. DVBE INCENTIVE:

Bidder must check the appropriate box from the choices below.

- ☐ I am a DGS certified DVBE. A copy of my DGS PD 843 form is attached.
- ☐ I am not a DGS certified DVBE, but a percentage of the revenue will be going to DGS certified DVBE Subcontractors performing a Commercially Useful Function, and therefore I am claiming the DVBE incentive.

Bidder must submit a complete Attachment 5: GSPD-05-105, Bidder Declaration (Written), indicating the percentage of the revenue that will be received by each DGS certified DVBE subcontractor. Bidder must also submit an Attachment 7, DGS PD 843 DVBE Declarations, for each DVBE subcontractor, signed by the DVBE owner/manager.

- ☐ I am not claiming the DVBE incentive.

Name of Bidder: _____

Signature and Date: _____

**ATTACHMENT 8
ACKNOWLEDGEMENT OF CONTRACT EXHIBITS**

Bidder's Name: _____

(Please print clearly or type)

Complete and return a signed copy of this attachment with the Bid.

Exhibit Name
Exhibit A – Scope of Work
Exhibit B – Budget Detail and Payment Provisions
Exhibit B – Attachment 1, Cost Worksheet. Note: Attachment 12, Cost Worksheet to be inserted upon contract award
Exhibit C, General Provisions, GSPD-401IT (09/5/14) https://www.dgs.ca.gov/-/media/Divisions/PD/PTCS/OPPL/Model-Language/IT/ITGeneralProvisions11192021.docx?la=en&hash=1333CDCE673BA36829779048AF8B233AF70081BE
Exhibit C, Cloud Computing-Software as a Service (SaaS) (6/7/19) https://www.dgs.ca.gov/-/media/Divisions/PD/PTCS/OPPL/Model-Language/CLOUDCOMPUTING_SaaS/SGP11192021.pdf?la=en&hash=13820BD4DA66DB6A8A17D19BC17BC66C724D5046 .
Exhibit D, Special Terms and Conditions

I certify that we have received, reviewed and accepted all requirements in this RFQ-ITS, Sample Contract and Exhibits and can meet the insurance and background check requirements.

Authorized Signature

Date

Name of Contractor Firm

Name and Title (Please Print)

ATTACHMENT 9
CALIFORNIA CIVIL RIGHTS LAWS CERTIFICATION (DGS OLS 04)

Pursuant to Public Contract Code Section 2010, if a bidder or proposer executes or renews a contract over \$100,000 on or after January 1, 2017, the bidder or proposer hereby certifies compliance with the following:

1. CALIFORNIA CIVIL RIGHTS LAWS: For contracts over \$100,000 executed or renewed after January 1, 2017, the contractor certifies compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code) and the Fair Employment and Housing Act (§12960 of the GC); and
2. EMPLOYER DISCRIMINATORY POLICIES: For contracts over \$100,000 executed or renewed after January 1, 2017, if a Contractor has an internal policy against a sovereign nation or peoples recognized by the United States government, the Contractor certifies that such policies are not used in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the Fair Employment and Housing Act (Section 12960 of the GC).

CERTIFICATION

<p>I, the official named below, certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.</p> <p><i>Proposer/Bidder Firm Name (Printed)</i></p>		<p><i>Federal ID Number</i></p>
<p><i>By (Authorized Signature)</i></p>		
<p><i>Printed Name and Title of Person Signing</i></p>		
<p><i>Date Executed</i></p>	<p><i>Executed in the County and State of</i></p>	

ATTACHMENT 10
Contractor/Consultant Confidentiality and Non-Disclosure Acknowledgement (ISO-004b)

(To Be Inserted)

ATTACHMENT 11
Contractor/Consultant Organization Information Security Agreement (ISO-004c)

(To Be Inserted)

ATTACHMENT 11 CONTINUED
Contractor/Consultant Organization Information Security Agreement (ISO-004c)

(To Be Inserted)

**ATTACHMENT 12
COST WORKSHEET**

Bidder's Name: _____
(Please print clearly or type)

The actual rates bid below by the Bidder shall be binding by the Contractor for the term of this contract. Any amendments to this contract will adhere to rates bid on the Cost Worksheet. SCO reserves the right to add funds to this contract for the cost of additional licenses stated in Sample Contract, Exhibit A, Scope of Work.

Service Description	Annual Price/Rate Per Each (a)	# of Licenses (b)	Total (c) a x b = c
Software Full User Licenses for Planview PPM Pro (Year 1) Term 1/16/2022 to 1/15/2023	\$	648 Active Users	(A)\$
Software Full User Licenses for Planview PPM Pro (Year 2) Term 1/16/2023 to 1/15/2024	\$	648 Active Users	(B)\$
Software Full User Licenses for Planview PPM Pro (Year 3) Term 1/16/2024 to 1/15/2025	\$	648 Active Users	(C)\$
Planview PPM Pro Sandbox (Year 1 based on 648 active users)	\$	1	(D)\$
Planview PPM Pro Sandbox (Year 2 based on 648 active users)	\$	1	(E)\$
Planview PPM Pro Sandbox (Year 3 based on 648 active users)	\$	1	(F)\$
Total Contract Amount A+B+C+D+E+F			\$
Optional Pricing		License	Sandbox
Optional: Add Additional Full User Licenses for Year 1 for Planview PPM Pro*		\$	\$
Optional: Add Additional Full User Licenses for Year 2 for Planview PPM Pro*			
Optional: Add Additional Full User Licenses for Year 3 for Planview PPM Pro*			

*Additional licenses regardless of license user type to be added in increments of 10 or more license entitlements as required throughout the agreement term. Additional licenses are based on the per seat cost of that particular year.