



State of California • Department of General Services • Gray Davis, Governor

## PROCUREMENT DIVISION

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### MASTER SERVICES AGREEMENT USER GUIDE CONTRACT AWARDS AS OF A RESULT OF: RFP MSA 01 MA-01 AND REVISION A

## SUPPLEMENT SEVEN

<b>CONTRACT NUMBERS:</b>	All
<b>EFFECTIVE:</b>	December 19, 2001 through December 18, 2005
<b>SERVICE:</b>	<b>INFORMATION TECHNOLOGY CONSULTING SERVICES</b> Category I = Independent Project Oversight Activities <i>(Sub-categories = IA and IB)</i> Category II = Project Activities <i>(Sub-categories = IIA, IIB, IIC, IID and IIE)</i> Category III = Miscellaneous Activities <i>(Sub-categories IIIA, IIIB, IIIC and IIID)</i>
<b>DISTRIBUTION CODE:</b>	ALL EDP CONTACTS; LOCAL AGENCY LIST; MSA CONTRACTORS, PD CENTRAL RECORDS
<b>NOTE:</b>	Electronic version of all documents associated with this MSA can be found on the DGS/PD Internet web page: <a href="http://www.pd.dgs.ca.gov/masters/itconsulting">http://www.pd.dgs.ca.gov/masters/itconsulting</a>
<b>USER GUIDE ISSUE DATE AND EFFECTIVE DATE:</b>	July 22, 2003

The purpose of this supplement is to address a number of issues:

1. KPMG Consulting is now officially known as Bearing Point.
2. Nitro web, Inc. is now officially named iRadeon.
3. Quarterly Reports are now being clarified and standardized. The attached pages describe the reporting requirements.
4. State and Local Agencies, as well as contractors that failure to report usage of this MSA can result in their purchasing delegation or their ability to use this MSA being taken away. Contractors who fail to submit accurate quarterly reports may be dropped from the MSA entirely.
5. The "State Contract and Procurement Registration System" went into effect July 1, 2003. This affects usage of this MSA. See the following pages for more information on this system.
6. On a monthly basis, the state will begin and publishing Contractor listings, eliminating the need to contact DGS to obtain the most current addresses and contact numbers for contractors.

### DEPARTMENT OF GENERAL SERVICES CONTACT

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(Signature On file)

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## 1. QUARTERLY REPORTING REQUIREMENTS

Contractors agreed in their original bid response to submit quarterly reports outlining their work under this MSA. There has been confusion as to a number of details about these reports. By this supplement, the state is standardizing these reports and processes for this MSA.

The following requirements now apply:

1. All contractors ***must*** submit an accurate and complete quarterly report, whether they have any orders or not. Failure to submit a report can be cause for removal from the MSA.
2. In order to standardize the due dates for these reports, the following apply:
  - a. Reporting Period 1: January 1 through March 31 – Quarterly Report due by April 15
  - b. Reporting Period 2: April 1 through June 30- Quarterly Report due by July 15
  - c. Reporting Period 3: July 1 through September 30- Quarterly Report due by October 15
  - d. Reporting Period 4: October 1 through December 31- Quarterly Report due by January 15
3. Contractors showing new orders or revised orders ***must*** include a copy of the ordering agency's Standard 65, Standard 2 or 213, or GSOP 206 (or the cover page from a local agency's order).
4. Exhibit 1 (attached) is now the standard format for the quarterly reports.

## 2. STATE CONTRACT AND PROCUREMENT REGISTRATION SYSTEM

As of July 1, 2003, the state launched the State Contract and Procurement Registration System. This system requires all orders over \$5000 to be registered on the system. This applies to orders placed under this MSA. DGS-PD will be monitoring the orders registered by agencies on this system, the quarterly reports from contractors, and the hiring reports from agencies.

***Failure by agencies to report orders or failure by contractors to submit quarterly reports can lead to disciplinary action, including loss of delegation authority for state agencies, to removal from the MSA for contractors.***

## 3. ON-LINE DATABASE INFORMATION

With the release of Supplement 3, the state discontinued in the User Guides for this MSA, the inclusion of contractor contact information. However, due to numerous requests from client agencies, the state as of this Supplement, will be posting and maintaining on a monthly basis, an on-line database, so agencies wishing to contact contractors will no longer have to contact DGS-

PD for the most recent information. This list will become Section V of the User Guide and it will have the posting date in the header of the database. It will not be issued as part of future supplements, but merely updated on a monthly basis.

It is the responsibility of contractors to keep the state informed of any changes to their contact information.

*This report does not break out which categories of service that the various contractors are approved to provide. It is a global listing of all firms on the MSA pool. It is up to client agencies to refer to previous supplements to the User Guides to determine exactly which categories the listed contractor are authorized to provide.*

## INFORMATION TECHNOLOGY MASTER SERVICES AGREEMENT QUARTERLY REPORT

Contractor Firm Name \_\_\_\_\_  
 Contractor MSA Number \_\_\_\_\_  
 Contractor Address \_\_\_\_\_ City \_\_\_\_\_  
 State \_\_\_\_\_ Zip \_\_\_\_\_ Phone # \_\_\_\_\_  
 Contact Person \_\_\_\_\_ e-mail address. \_\_\_\_\_

If there are any changes to the above since the last report, check here: \_\_\_\_\_

Report Submitted By \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_

1. Check the period being reported below:

- \_\_\_\_ Reporting Period 1: January 1 through March 31 – Quarterly Report due by April 15
- \_\_\_\_ Reporting Period 2: April 1 through June 30- Quarterly Report due by July 15
- \_\_\_\_ Reporting Period 3: July 1 through September 30- Quarterly Report due by October 15
- \_\_\_\_ Reporting Period 4: October 1 through December 31- Quarterly Report due by January 15

Actual Date of Report Submittal: \_\_\_\_\_

2. Check all of the following that are appropriate:

Our firm did not receive any new contract awards this quarter. \_\_\_\_\_  
 Our firm received new contract awards this quarter. \_\_\_\_\_  
 Our firm continued on with contract work from a previously awarded contract. \_\_\_\_\_  
 (List the previous contract number here: \_\_\_\_\_ Agency name \_\_\_\_\_)

3. During the last quarter, did your firm compete for contracts under this MSA? Yes \_\_\_\_ No \_\_\_\_

4. If yes to number 3 above, please list the Issuing Agency, and the approximate amount of your Quote by Service Category. Please provide the Agency Bid Number, Contact Person, and phone number.

Also, if known, please provide the name of the firm that won the contract.

ISSUING AGENCY \_\_\_\_\_ BID NUMBER \_\_\_\_\_  
 YOUR TOTAL BID AMOUNT \_\_\_\_\_ DATE BID DUE \_\_\_\_\_

AGENCY CONTACT PERSON \_\_\_\_\_ PHONE \_\_\_\_\_

NAME OF FIRM AWARDED CONTRACT \_\_\_\_\_

Repeat as necessary if your firm competed for more than one project.

- 5. If you received a contract award, please itemize each award below. Use additional pages if necessary:

**Include a copy of the Standard 65, Standard 2 or 213, GSOP 206 form or the local agency contract cover page for each award with this report.**

Agency Name \_\_\_\_\_ Agency Billing Code \_\_\_\_\_

Agency Contract Number \_\_\_\_\_

Contract Award Date \_\_\_\_\_

Amount of Contract \$ \_\_\_\_\_

Contract Start Date \_\_\_\_\_ Contract End Date \_\_\_\_\_

For each Service Category you are providing, list each job classification and the total number of hours authorized to perform, during the entire period of the contract:

Job Classification \_\_\_\_\_ Rate Per Hour \$ \_\_\_\_\_ x Hours \_\_\_\_\_ = \$ \_\_\_\_\_

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If you receive more than one contract during the period, repeat the information asked for in number 5 again for each contract received.

- 6. Please provide information on any projects that were on last quarter's report that have ended or that you did no work on during the past quarter.

- a. CONTRACT NUMBERS THAT ENDED DURING THE LAST QUARTER:

\_\_\_\_\_

b. CONTRACT NUMBERST THAT HAD NO ACTIVITY DURING THE LAST QUARTER. \_\_\_\_\_

7. Please provide any comments or issues that you wish to share that might help make this MSA more useful to you or state agencies.