

INFORMATION TECHNOLOGY (IT) PURCHASE ESTIMATE (PE) PREPARATION & SUBMISSION CHECKLIST

The following check list has been prepared to assist you in the preparation and submittal of your IT PE (Std. 66) requests to the Procurement Division (PD), One Time Acquisitions (OTA) unit.

Item	Description	✓
Confirm purchase is not a Reportable Project	If your request is related to a "Reportable Project", please submit your request to the California Department of Technology (SAM 4819.37). Refer to BB P-10-13: http://www.documents.dgs.ca.gov/pd/delegations/pac091113_P-10-13.pdf List of Agency Assigned Dept. of Technology Contacts: http://www.cta.ca.gov/Contact_Us/staff_assignments.html List of existing Reportable Projects: http://www.cta.ca.gov/Government/IT_Policy/IT_Projects/index.html	
Purchase Estimate (Std. 66)	Completed and signed.	
Mission Critical Certification w/signatures	Must be signed (wet signature) by Agency Secretary or Director or authorized designee and submitted with PE. Refer to SCM Vol. 3, Ch. 2, Section B, Topic 4 (2.B4.15)	
Pre-Procurement Reviews and Approvals	Certain classes of purchases that may require review and approval before a department can proceed with a purchasing activity. Refer to SCM Vol. 3, Ch. 2, Section C	
Certification of Compliance with State IT Policies	IT Procurements valued at \$100,000 or more. Refer to SAM 4832 and SCM Vol. 3, Ch. 2, Section C, Topic 6 (2.C6.0) http://www.documents.dgs.ca.gov/sam/pdf/4832ILLus.pdf	
Internal IT Approval	IT Procurements under \$100,000 Provide documentation as to how the acquisition was authorized. Acceptable forms of documentation are: <ul style="list-style-type: none"> • Desktop and Mobile Computing Policy (DMCP Form) • Approved FSR Transmittal • PIER approval letter, Identifying how acquisition is excluded from SAM 4819.32 Refer to SCM Vol. 3, Ch. 2, Section B, Topic 7 (2.B7.0) and Topic 6 (2.C6.2) "Sample" DMC Form: http://www.documents.dgs.ca.gov/pd/pestatus/DMC.doc	
Feasibility Study Report (FSR) with approval signatures and FSR number	For IT Projects - Submit FSR, documentation of scope, costs, benefits, schedules and methodologies. Refer to SCM Volume 3, Ch. 2, Section C, Topic 3.1 (2.C3.1) Refer to CTA letters** TL 12-1, TL 12-17 & TL 13-03 http://www.cio.ca.gov/Government/IT_Policy/TL.html	
Internal FSR	Submit a copy of Internal FSR. Refer to SAM 4819.35.	
GC 19130(b) Justification (STD 215 or equivalent) and proof of submittal to DPA (personal services only)	Refer to SCM Vol. 3, Ch. 2, Sec. B, Topic 4.3 (2.B4.3) Contracted Services http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm	
Bargaining Unit Notification (personal services contracts only)	Bargaining Unit Notification of proposed personal services contracts. GC 19130, 19132 and 11045, MM 14-01 http://www.documents.dgs.ca.gov/osp/sam/memos/MM14_01.pdf	

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Statewide Contract Exemption Form	Submit justification for purchasing outside the IT statewide contract. Refer to SCM Vol. 3, Ch. 6, Section D, Topic 1.9 (6.D1.9) http://www.documents.dgs.ca.gov/pd/pestatus/CSSI_Exemption_Form.pdf	
Statement of Work (SOW)	Submit written description of work to be performed in MS Word format . Refer to SCM Vol. 3, Ch. 2, Section B, Topic 5.1 (2.B5.1)	
Proprietary Letter or Sole Source letter	If applicable. Current letter on company letterhead from the manufacturer / supplier, addressed to State Agency, dated and signed.	
Price Quote	Manufacturer / Supplier's price quote.	
Prior Purchase Order	Copy of prior PO if request is for a renewal of services or like items.	
Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) Option Market Research	If \$5,000 - \$249,999.99 (if applicable). Refer to Government Code (GC) Section 14838.5 (a) and (b) Refer to SCM Vol. 3, Ch. 4, Section B, Topic 7	
Limit to Brand Statement (GSPD-08-001)	If applicable. For IT-Goods only. Refer to SCM Vol. 3, Ch. 4, Section C, Topic 3	
IT LTB Worksheet	If applicable. For IT-Goods only. http://www.documents.dgs.ca.gov/pd/pestatus/IT_LTB_Worksheet_10-22-13.docx	
Non-Competitively Bid (NCB) Contract Justification (GSPD-09-007)	If applicable. Include Market Analysis documentation, Supplier's List Pricing and Supplier's Quote. Refer to SCM Vol. 3, Ch. 5, Topic 1. NCB Form: SCM Vol. 3, Ch. 5, Topic 1.3 SCR Form: SCM Vol. 3, Ch. 5, Topic 4.0	
IT NCB/SCR Worksheet	If applicable. http://www.documents.dgs.ca.gov/pd/pestatus/IT_NCB_SCR_Worksheet_10-22-13.docx	
Property Survey Report Form (Std.152)	Trade in of state property if applicable. Refer to SCM Vol. 3, Ch. 10, Topic 7	
Cost Worksheet	If applicable. For more than 10 line items.	
Telecommunication Goods and Services	Send all acquisitions for Telecommunication Goods and Services to the California Dept. of Technology for processing per PCC 12120.	