



M E M O R A N D U M

Date: June 20, 2001

To: State Contracting Agencies and Departments

From: Department of General Services
Office of Legal Services
1325 J Street, Suite 1911
Sacramento, CA 95814

Subject: **STATE CONTRACTING FORMS AND PROCEDURES CHANGES
EFFECTIVE JULY 1, 2001 and OCTOBER 1, 2001**

This memo is a follow-up to our initial memorandum dated May 18, 2000 regarding the changes to the State's contracting process and the conversion to the "standardized contracting process". A copy of that memo is attached for your information.

This is the first in a series of informational memos that will be sent as the various phases of new contracting process and procedures are instituted in order to ensure a smooth transition to the new "standardized process".

Contract Amendments – Effective July 1, 2001:

Effective July 1, 2001, the Department of General Services (DGS), Office of Legal Services (OLS) will no longer be retaining copies of all agreements. If you are forwarding an amendment for approval, you must submit a reference copy of the original agreement, along with copies of all prior amendments, whether or not they were exempt from DGS-OLS review. These reference copies will be returned at the conclusion of the review process. This requirement applies whether or not you are using the standardized process/forms or the Std 2 or Std 13 formats.

New Standard Process – Effective October 1, 2001:

The Std 213 replaces the Std 2 and the Std 13. The Std 213A is used for amending any agreement, standard or inter-agency. The Std 215 replaces the Std 15. The new format is explained in detail on the DGS-OLS website where you can also view/print the required forms. The web address is www.dgs.ca.gov/ols. The information is posted under the navigation bar marked "Contracting Info". The forms are in Microsoft Word on the OLS Homepage, and will soon be available in tablet form and in Microsoft Word format at the Office of State Publishing (OSP). We anticipate this may be as soon as July 1, 2001.

When using the “standardized process”, please send the following forms:

New Agreements:

Std 215 Two (2) **copies** of the Std 215

Std 213 Two (2) **originals** of the Std 213 face sheet alone, no agreement attached.
One (1) **copy** of the Std 213 face sheet, attached to a complete copy of the agreement
One (1) **copy** of the Std 213 face sheet alone, no agreement attached.

All required background information.

Amendments:

Std 215 Two (2) **copies** of the Std 215

Std 213A Two (2) **originals** of the Std 213A face sheet alone, no agreement attached.
One (1) **copy** of the Std 213A face sheet, attached to a complete copy of the agreement
One (1) **copy** of the Std 213A face sheet alone, no agreement attached.
One (1) **reference copy** of the original agreement, along with copies of all prior amendments, whether or not they were exempt from DGS-OLS review.

All required background information.

Documents to be Returned to Submitting Agency:

After your agreement is reviewed and approved, we will return to you the two **original** face sheets of the Std 213 or Std 213A, along with all background information you submitted, including your reference copies referred to under “Amendments” above. **With some exceptions**, we will no longer maintain a copy of the complete agreement at DGS-OLS.

A chart outlining what forms to use with the new standardized process is attached for easy reference. If you need assistance or further information on using the new process, please visit our website listed above. If after viewing the information and instructions on the Internet, you still require assistance, please contact your assigned DGS-OLS attorney. To determine who your attorney is, please visit our website and view the "Directory".

If you have any other questions or concerns, please contact me, or my assistant, Rosemary Thielke, at (916) 322-5184, or Patricia Whitfield, Legal Support Supervisor, at (916) 324-6327.

JEFF MARSCHNER, Chief Counsel
Office of Legal Services

FORMS CONVERSION CHART

CURRENT AGREEMENT OR FORM	CURRENT FORM NUMBER	STANDARDIZED PROCESS FORM NUMBER
Contract Transmittal	Std 15	Std 215
Standard Agreement	Std 2	Std 213
Interagency Agreement	Std 13	Std 213
Agreement Amendments	Std 2 or Std 213	Std 213-A

STANDARDIZED PROCESSING DETAILS CHART

Std 215	For all agreements and amendments: Send two (2) copies .
Std 213	Two (2) originals of the Std 213 face sheet alone One (1) copy of the Std 213 face sheet, attached to a complete copy of the agreement, and all relevant back-up. One (1) copy of the Std 213 face sheet alone
Std 213-A	Two (2) originals of the Std 213A face sheet alone One (1) copy of the Std 213A face sheet attached to a complete copy of the agreement, and any relevant back-up One copy of the Std 213A face sheet One reference copy of the original Agreement, along with copies of all prior amendments, regardless of whether or not they were exempt from DGS-OLS review.

DISTRIBUTION UPON APPROVAL

Submitting Agency	Two originals of the Std 213 face sheets
Office of Legal Services	One copy of the Std 215 One copy of the Std 213 face sheet *See Below
Controller	One copy of the Std 215 One copy of the 213 face sheet

*** In some instances, at the discretion of OLS, we will retain the complete agreement at OLS; otherwise, we will dispose of it.**