

PURCHASING AUTHORITY IS GRANTED FOR PROCUREMENT ACTIVITIES CONDUCTED BY:

Agency/Department:	Franchise Tax Board	Purchasing Authority Number: FTB-7730
Purchasing for Secondary Department:	N/A	
Purchasing Authority Effective Date:	February 9, 2016	
Revised Effective Date:	June 3, 2016	

Procurement and Contracting Officer (PCO):	Michael Banuelos Michael.Banuelos@ftb.ca.gov	(916) 845-6110
Non-IT Purchasing Authority Contact (PAC):	Bill Christian Bill.Christian@ftb.ca.gov	(916) 845-6219
IT Purchasing Authority Contact (PAC):	Yvonne Olson Yvonne.Olson@ftb.ca.gov	(916) 845-3394

Dollar Thresholds Noted Below Shall Be Applied Per Transaction.

ACQUISITION METHOD		IT	NON-IT GOODS	NON-IT SERVICES
COMPETITIVE				
1	Fair and Reasonable	By statute - \$4,999.99		Refer to SCM Vol. 1
2	Formal	\$ 5,000,000.00	\$ 750,000.00	Refer to SCM Vol. 1
3	Informal	\$ 1,000,000.00	\$ 100,000.00	N/A
4	SB Option	By statute – may not exceed \$249,999.99		Refer to SCM Vol. 1
5	DVBE Option			Refer to SCM Vol. 1
NON-COMPETITIVELY BID (NCB) (Contracts as a result of an approved NCB/Special Category Request (SCR) Justification or exempt from competition by law or policy)				
6	NCB Contract (as a result of an approved NCB or SCR Justification)	\$ 5,000,000.00	\$ 750,000.00	Refer to SCM Vol. 1
Exempt by Law:				
7	Community Based Rehabilitation Program	Unlimited	Unlimited	Refer to SCM Vol. 1
8	Emergency Contracts	Unlimited	Unlimited	Refer to SCM Vol. 1
9	Interagency Agreement (IAA)	\$ 5,000,000.00	N/A	Refer to SCM Vol. 1
10	IT IAA with Department of Technology (Data Center Services)	Unlimited	N/A	N/A
11	Prison Industry Authority (PIA)	N/A	Unlimited	Refer to SCM Vol. 1
Exempt by Policy:				
12	Emergency Contract (non-natural disaster)	\$ 25,000.00	\$ 25,000.00	N/A
13	New/Existing Proprietary Software, Proprietary Maintenance, Proprietary Subscriptions/Publications	\$ 5,000,000.00	\$ 750,000.00	Refer to SCM Vol. 1
LEVERAGED PROCUREMENT AGREEMENTS (requiring further competition within the category (i.e. obtaining offers, etc.) – refer to individual LPA user instructions)				
14	1122 Procurement Program (GSA Component)	N/A	\$ 0	N/A
15	CMAS	\$ 500,000.00	\$ 100,000.00	\$ 250,000.00*
16	Cooperative Agreements	Refer to user instructions	Refer to user instructions	Refer to user instructions
17	Master Agreements	\$ 1,500,000.00	\$ 500,000.00	\$ 500,000.00
18	Software Licensing Program	\$ 2,000,000.00	N/A	N/A
19	State Price Schedules	\$ 25,000.00	\$ 25,000.00	N/A
LEVERAGED PROCUREMENT AGREEMENTS (no further competition required – refer to individual LPA user instructions)				
20	Cooperative Agreements	Refer to user instructions	Refer to user instructions	Refer to user instructions
21	Master Agreements	Refer to user instructions	Refer to user instructions	Refer to user instructions
22	Statewide Contract Orders	Unlimited	Unlimited	N/A

PRE-PROCUREMENT REQUIREMENT	IT	NON-IT GOODS	NON-IT SERVICES
Justifications			
Non-Competitively Bid (NCB) Justification	Current policy – may not exceed \$25,000.00		Refer to SCM Vol. 1
Limited To Brand (LTB) Justification			N/A

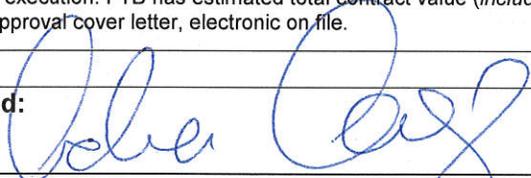
* CMAS Non-IT Services orders above \$50,000 must be approved by the Department of General Services, Procurement Division prior to award (State Contract Manual (SCM) Vol. 2, Chapter 6)

Transactions Exempt from Purchasing Authority (list the applicable law or Executive Order and a brief description):

The department has requested and been granted the following Transaction-Based Purchasing Authority Approval(s). This is **not** a general expansion of authority and is limited as follows:

6/3/2016: Franchise Tax Board (FTB) has been granted a transaction-based purchasing authority increase to purchase **Software AG** under their **new/existing proprietary software/maintenance** information technology (IT) acquisition method. The term of the contract will be **sixty months** from date of contract execution. FTB has estimated total contract value (including amendments) shall not exceed the amount of **\$10,000,000.00**, further details in the attached approval cover letter, electronic on file.

Approved:



Adrian Carranza, Purchasing Authority Specialist
 Adrian.carranza@dgs.ca.gov (916) 375-4383

6/3/2016

Date