

*For PD Use only*  
 LPAER#: \_\_\_\_\_  
*This # must appear on the  
 Purchase Document.*

## Leveraged Procurement Agreement Exemption Request to \$500,000 limit

This Request must be submitted in order to obtain approval to execute a purchase document that exceeds the Leveraged Procurement Agreement dollar thresholds limits for master agreements and cooperative agreements. See Purchasing Authority Manual, Chapter 6, Section F and Section G. This form consists of 3 pages, all requested information must be provided for this request to be considered.

Requesting Department Information		
<b>Department:</b> (Name and Address)	<b>Telephone #:</b> ( )	
<b>Dept. Contact Name:</b> (Must be the Purchasing Authority Contact)	<b>Email Address:</b>	<b>FAX #:</b> ( )
<b>Project Name:</b> (In addition to the name of the project, provide any other pertinent description or details about the project.)		
<b>Estimated value of procurement:</b> \$		<b>Estimated Solicitation Release Date:</b>

**Identify below the Leveraged Procurement Agreement to be used:**  
 (For example the ITMSA, MRA, WSCA and corresponding Contract #)

\_\_\_\_\_

**Leveraged Procurement Agreement Name**

\_\_\_\_\_

**Contract #**

<b>Describe the project, include hardware, software and any services that the contractor will provide:</b>

Department Agreement
<p>The department agrees that it will provide the appropriate project authority documentation in support of the acquisition and expenditure of IT funds. Upon approval of this exemption, the department will submit the Request For Offer (RFO) document for review by DGS/ PD Technology Acquisitions Section (TAS).</p> <p>Upon DGS/PD approval of the Request for Offer (RFO), the department may release it to elicit offers. The department agrees that at the conclusion of the procurement and PRIOR to contract award, that TAS will receive, one copy of: (1) the final RFO including all Addenda, (2) all RFO responses submitted, (3) the contract, and (4) the Final Evaluation and Selection Report to the TAS for concurrence with selection. Upon concurrence, TAS will provide a written concurrence letter and the department may proceed with contract execution.</p> <p>The assigned LPAER number must appear on all solicitation-related documentation and related purchase documents for compliance and reporting.</p> <p>Upon execution of the purchase document, submit a copy to TAS. <i>(Do not send the purchase document to DGS/Capture Unit, as it will result in duplication of DGS administrative fee charges to the department.)</i></p>
<p><b>Signed By:</b> _____ <b>Date:</b> _____ <b>And:</b> _____ <b>Date:</b> _____</p> <p style="text-align: center;"><b>Procurement and Contracting Officer</b> <span style="margin-left: 200px;"><b>Purchasing Authority Contact</b></span></p>

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<b>Approved By:</b> _____ <b>Date:</b> _____ (TAS Procurement Official)
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**Provide responses that are thorough and complete or this Request may be returned unapproved.**

**For WSCA requests only, answer the following:**

- 1. Identify the need for the goods and/or services and dollar value of the requested purchase, be specific.**
  
- 2. Explain how the department has determined that issuance of a purchase using either of these contracting methods to the particular contractor makes good business sense and how best value for the department has been achieved.**
  
- 3. Have all required Project Approvals been received (i.e., Department of Finance, departmental internal, DGS/Telecommunications, etc)? See PAM Chapter 2, Section C, Topics 6 & 7.**

**CHECK AND ATTACH APPROVAL DOCUMENTS THAT APPLY TO THIS REQUEST:**

- Department of Finance (FSR Approval Letter)
- Department of General Services--Information Technology Procurement Plan (ITPP)—SAM 5200.6 and MM 03-05
- Department of General Services—Telecommunications—MM 04-08
- Exclusions--SAM 4819.32--Reference exclusion \_\_\_\_\_.
- Qualification of an IT activity as a previously approved effort requires an approved FSR and an approved PIER in accordance with SAM Section 4819.35.
- Certification For Procurement that cost \$100,000 or more and are in support of a development effort—SAM 4819.41
- Certification of Compliance with Policies—required format provided in SAM 4832, Illustration 1
- Agency Certification—SAM 5200.7
- Management Memo 03-10, Attachment \_\_\_\_\_, item # \_\_\_\_\_

**The questions below are required to be answered for all other Leveraged Procurement Agreement Exemptions:**

- 1. Describe how “best value” for the state will be assured. How are the needs of the State best served by not formally bidding this offer on the open market.**
  
- 2. Describe the evaluation methodology proposed for this project, including:**
  - the administrative and technical criteria and how they will be assessed versus cost,
  - the assignment of points for value effective criteria, and
  - any risk mitigation measures being considered and how they will be evaluated.
  
- 3. If the evaluation will consider only lowest cost to the State, describe the rational that assures the best interests of the State will be met. How are costs determined to be fair and reasonable?**
  
- 4. If consulting services, describe how the services requested meet Government Code 19130.**
  
- 5. What kind of peer review will the department use to ensure that the solicitation:**

- includes all pertinent requirements,
- thoroughly integrates the requirements with the evaluation methodology, and
- has been read and edited for content, spelling and grammar.

**6. Is there potential for California certified small businesses (SB) and disabled veteran business enterprises (DVBE) to participate in this RFO? Refer to the User Instructions of the Leveraged Procurement Agreement.**

**7. Designate the procurement contact person. Have they been identified in the solicitation?**

**8. Describe the contract implementation management team as required by the solicitation. List the key personnel by job title and required experience.**

**9. The GSPD 401IT General Provisions or other approved contract language has been incorporated into the pertinent Leveraged Procurement Agreement.** In addition, as applicable, the most current version of the State's information technology contract language modules has been incorporated into the solicitation. This language may not be modified. Requests for changes must be made in writing and be approved by DGS/PD prior to releasing the RFO. A department's specific business needs should be included in a Statement of Work.

**Note: The contract language including the Statement of Work must be included with the submittal of the RFO to TAS.**

**CHECK ALL THAT APPLY TO THIS RFO:**

- Statement of Work
- Agency Special Provisions
- Other \_\_\_\_\_

**10. Have all required Project Approvals been received (i.e., Department of Finance, departmental internal, DGS/Telecommunications, etc)? See PAM Chapter 2, Section C, Topics 6 & 7.**

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**11. Describe any other significant factors affecting this project.**