

# ORDERING PROCEDURES

## FOR USE OF THE PREQUALIFIED E-COMMERCE / E-GOVERNMENT CONTRACTORS

(For contracts less than  
\$250,000.00)

### MULTIPLE AWARD CONTRACT

April 13, 2001

#### MISSION STATEMENT PROCUREMENT DIVISION

*To provide professional, value-added procurement and materials management services, using effective innovative processes that result in continuous customer satisfaction while maintaining public trust with the assurance that each tax dollar will be used in the most efficient manner.*

# E-COMMERCE / E-GOVERNMENT SERVICES

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#### A. PURPOSE/SERVICES OFFERED BY THE PREQUALIFIED POOL OF CONTRACTORS

This Multiple Award Contract (MAC) provides State and Local Agencies with a pool of prequalified contractors that specialize in providing E-Commerce / E-government services, for projects under \$250,000.

In general, the services these prequalified contractors can provide are :

- 1.) Internet Hosting
- 2.) Internet Planning
- 3.) Internet Designing and Implementing
- 4.) Internet Security
- 5.) Designing of Search Engines and
- 6.) Other related E-Business tools

The contractors on this contract submitted a compliant bid in response to the State's Administrative and Technical requirements. In addition, they have verified their expertise and have experienced staff in the following areas:

1. Business Application Development Specialists
2. E-Commerce Architect
3. Software Architect/Senior Software Developer
4. Application Developer/Programmer
5. Internet Developer
6. Database Developer
7. System Architect
8. Project Management

RATHER THAN ATTACH A COMPLETE SET OF REQUIREMENTS THAT WERE USED TO ESTABLISH THIS POOL (WHICH WOULD BE QUITE LENGTHY), THE REQUIREMENTS ARE POSTED ON THE DGS-PD WEBSITE. ( URL ADDRESS [www.pd.dgs.ca.gov](http://www.pd.dgs.ca.gov)) AGENCIES WHO ARE CONSIDERING USE OF THIS POOL SHOULD REFER TO THIS SITE TO GAIN AN UNDERSTANDING OF THE DETAILED REQUIREMENTS THAT THE PREQUALIFIED CONTRACTORS RESPONDED TO.

A Local Agency is any city, county, district or other governmental body empowered to spend public funds per California Public Code 12110. **While the State of California makes this MAC available to Local Governmental Agencies, each Local Agency should make its own determination whether using the MAC is consistent with their procurement policies and regulations.**

#### B. BENEFITS

There are a number of benefits to be gained by using these prequalified contractors. The contractors listed have responded to a very detailed bid and

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were evaluated and ranked by the State Office of Procurement. These contractors have proven expertise and have staffing in-place to provide

E-Commerce/E-Government services. The procedures and requirements to be included in this contract are far more detailed and stringent than contractors that have merely been awarded a California Multiple Awards Schedule (CMAS). These prequalified contractors have staff in-place that met the state's minimum experience requirements. The benefits of utilization of the MAC are:

1. ***A greatly abbreviated bidding process.*** *Prenegotiated contracts with each of the prequalified contractors are already in place, so there is no need to negotiate an entire contract.*
2. ***Only deal with prequalified contractors.*** *Your agency will be working with only a limited number of prequalified contractors. This eliminates the time spent investigating unknown contractors, or dealing with numerous bidders, who may not be even qualified for your work.*
3. ***Less time developing your administrative requirements.*** *Since most of the administrative requirements are already done you can focus on only those administrative requirements that are unique to your project, thereby saving you time.*
4. ***A faster award process.*** *You will not have to deal with protests. The contractors on this MAC have waived their right to protest awards made under this MAC.*
5. ***The assistance of DGS-PD if needed to make your project a success.*** *DGS-PD wants your project to be a success and will to assist you in the use of this contract.*

#### C. RESTRICTIONS

The pre-qualified pools of contractors included in this contract have been approved for projects up to the following specified amounts.

- Contractors in Category I, have been approved for projects up to a maximum of \$25,000.
- Contractors in Category II, have an approval for projects up to \$250,000.00

These contractors are ***not*** approved, nor have they demonstrated experience in projects above their approved Category level. Should your agency have a project with a higher budget amount, there are prequalified contractors in Categories III and IV. However, DGS-PD is not delegating larger projects under this MAC. If your project is going to be more than \$250,000.00, please contact the DGS-PD for guidance and assistance.

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**NOTE:** It is acceptable for a Category II contractor to bid on a Category I project. However, a Category I contractor cannot bid on a Category II project. Therefore, if you have a Category I project, you are encouraged to send a copy of your bid to contractors in Categories I and II.

**It is still necessary for the delegated agencies to develop a statement of work that must be bid. No specific hourly rates have been negotiated by the Department of General Services when creating this pool. Therefore, you will need to obtain the rates and pricing for your project as part of your bid.**

#### D. ORDER PLACEMENT

You may place your order anytime during the effective periods of this contract. The current contract is effective from September 18, 2000 through September 18, 2002, with the option for two (2) one-year extensions. It is further anticipated that additional contractors will be added to the prequalified contract. Therefore, it is suggested that you visit the DGS-PD's website for updated listings for additional contractors who may have been added to the contract.

You must use Form GSOP-206-EPQ to place an order or local agency equivalent. A sample of this form is included in Section IV. State and Local agencies will be charged a fee and they agree to pay the State's fees charged for these services. The current State fee is 1.21% of the contract amount. Should the project dollar amount increase after the initial contract, 1.21% of the additional amount is also due to DGS-PD.

#### E. ORDER INITIATION

The ordering agency must coordinate with the applicable units within and outside of their agency (i.e., Procurement, Business Services, Department of Information Technology, Department of Finance, Contracts, etc.). There may be other forms or documentation that needs to be completed. Once you have obtained the appropriate approvals, the contractors may be solicited to provide specific proposals to your requirements. State Agencies must complete a GSOP-206-EPQ, filled out according to the ordering procedures in Section II. Local Agencies may use the State's GSOP-206 EPQ or may use their own ordering documentation but their documentation must contain at a minimum the same information as listed on the State's GSOP-206 EPQ.

#### F. PREQUALIFIED CONTRACTORS BY BUDGET CATEGORY

Following is a listing of prequalified prime contractors by Category as of March 1, 2001. If a subcontractor is shown, the prime needed that subcontractor's expertise to qualify in one or more areas of the State's requirements. The State's contract is with the Prime Contractor, not the subcontractor. You should ask questions about the use of the subcontractor in your project and contact DGS-PD if additional assistance is needed.

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**CATEGORY 1 (approved for projects up to \$25,000)**

<b>PRIME CONTRACTORS</b>	<b>SUBCONTRACTORS</b>
Genesis Data Donald Modora 433 Callan Ave., Ste. 101 San Leandro, CA 94577 (510) 352-4600	Williams Wallace Management Consulting Sam Wallace 405 14 <sup>th</sup> St., Ste. #500 Oakland, CA 94612 (510) 835-4414 (510) 835-4431
Hewlett-Packard Company Grant Easton PC 8000 Foothills, M/S 5217 Roseville, CA 95747 (916) 785-0332	No Subcontractors
Hitachi Data Systems Solution Corp. Cheryl Gardner 8950 Cal Center, Ste. 265 Sacramento, CA 95826 (916) 855-4920	T.I.S. Data Systems Gary Raymond 525 Market Street Ste. 200 San Francisco, CA 94105 (415) 369-0270 (415) 369-0279
Internet Business Integrators Mitch Meade PO Box 161505 Sacramento, CA 95816 (916) 799-7373	Sunrise Technologies Chuck Starks 110 Blue Ravine Road, Ste. 162 Folsom, CA 95834 (916) 985-0112 (916) 985-0763
McDowell Consulting, Inc. Darrell D. McDowell, Jr. President 675 Hegenberger Rd., Ste. 247 Oakland, CA 94621 (510) 568-9020	No Subcontractors
Net Team, Inc. Kevin Manzer 3927 Lenhane Drive, #100 Sacramento, CA 95834 (916) 928-6376 <a href="mailto:info@internetteam.com">info@internetteam.com</a>	No Subcontractors
O'Brien High Tech Industries Aida O'Brien President 33 Pheasant Lane Aliso Viejo, CA 92656 (949) 716-6436	No Subcontractors
Silicon Finance, LLC Peter Chao 807 Montgomery Street San Francisco, CA 94133 (888) 508-7863	No Subcontractors

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<p>Technology Managers Jim McReynolds 4600 Northgate Blvd., Ste. 110 Sacramento, CA 95834 (916) 716-6436</p>	<p>Y Communications Mark Yaklich 3101 Sunset Blvd. Ste. 1E Rocklin, CA 95677 (916) 632-9260 (916) 632-7163</p>
<p>The Huebner Group Pamela Huebner 108 L Street Sacramento, CA 95814 (916) 558-1410</p>	<p>Vigor Information, Inc. Linda Tan 417 Balboa Street San Francisco, CA 94118 (415) 751-0578</p>
<p>Tier Technologies, Inc. James Weaver 1350 Treat Blvd., #250 Walnut Creek, CA 94596 (925) 937-3950</p>	<p>No Subcontractors</p>

**CATEGORY II CONTRACTORS**(approved for projects up to \$250,000)

<b>PRIME CONTRACTOR</b>	<b>SUBCONTRACTORS</b>
<p>Bask Computers Shan Patil 21 Massolo Drive Pleasant Hill, CA 94523 (926) 689-8800</p>	<p>No Subcontractors</p>
<p>Consulting Services, Inc. Gino Creglia 11140 Fair Oaks Blvd., Ste. 6 Fair Oaks, CA 95628 (916) 535-7565</p>	<p>No Subcontractors</p>
<p>Gensa Cooperation Robert Lutolf 324-A Campus Lane Fairfield, CA 94585 (707) 864-1766</p>	<p>No Subcontractors</p>
<p>Hume Technology Solutions, Inc. Bob Hume 9198 Greenback Lane Orangevale, CA 95662-5901 (916) 987-930</p>	<p>No Subcontractors</p>
<p>Info Pros Caroline Drakeley 6060 Sunrise Vista Drive., Ste. 2180</p>	<p>Visionary Integration Professionals Steve Carpenter</p>

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Citrus Heights, CA 95610 (916) 725-5558	160 Blue Ravine, Ste. D Folsom, CA 95630 (916) 985-9625 (916) 985-9632
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<p>Laser Link, Inc. Carrie Lancaster 13073 Poway Road Poway, CA 92064 (858) 486-8130</p>	<p>Baltimore Technologies Steve Kruse 155 Bovet Road, Ste. 400 San Mateo, Ca (650) 372-5290</p>
<p>Logicon George Vrtiak 2150 River Plaza Drive Ste. 255 Sacramento, CA 95833 (916) 567-9995</p>	<p>Netgateway, Inc. Robert Ampe 300 Oceangale Long Beach, Ca (562) 506-4600 (562) 308-0021</p>
<p>Soffia Technologies, Inc. P.K. Sharma 43130 Christy Street Fremont, CA 94538 (510) 687-9434</p>	<p>No Subcontractors</p>
<p>US Data Management, LLC Joanie Waltrip 3891 State Street, Ste. 207 Santa Barbara, Ca 93105 (805) 569-9897</p>	<p>No Subcontractors</p>
<p>Vision One Rhonda Manfredo 6781 N. Palm Ave. Ste. 120 Fresno, Ca 93704 (559) 432-8000</p>	<p>No Subcontractors</p>
<p>Visionary Integration Professionals, Inc. Christina Johnston 160 Blue Ravine Road., Ste. D Folsom, CA 95630 (916) 985-9625</p>	<p>Info Pros Doug Drakeley 6060 Sunrise Vista Drive., Ste. 2180 Citrus Heights, CA 95610 (916) 725-5558 (916)726-8223</p>
<p>Waltrip &amp; Associates Stephen Waltrip 1750 Howe Ave., Ste. 260 Sacramento, CA 95825 (916) 925-2058 <a href="mailto:swaltrip@logicalec.com">swaltrip@logicalec.com</a></p>	<p>WebMetro Kristina Brace 2 N. lake Ave., Ste. 100 Pasadena, Ca 91101 (626) 793-8047 <a href="mailto:Kbrace@webmetro.com">Kbrace@webmetro.com</a></p>

**G. STATE OF CALIFORNIA CONTACT**

Joyce Yohner  
Department of General Services  
Procurement Division  
1823 14<sup>th</sup> Street, Room 204  
Sacramento, CA 95814

**E-COMMERCE / E-GOVERNMENT SERVICES**  
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(916) 323-2671

[mark.mitchell@dgs.ca.gov](mailto:mark.mitchell@dgs.ca.gov)

## **E-COMMERCE / E-GOVERNMENT SERVICES**

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#### **CONTRACT GUIDELINES**

##### **A. NEW ORDERS PROCESS/SUGGESTED RFP FORMAT**

To begin, you must first determine if your project will be less than \$250,000. If it is, this MAC may be utilized. If it is less than \$25,000, you will be able to solicit bid responses and pricing from both the Category I and Category II contractors. If the project is greater than \$25,000 and less than \$250,000, you need only solicit responses from the Category II contractors.

Next, you will need to develop a scope of work specific to your project and any additional contractual terms beyond what has already been established (refer to the contract attached for more information on the existing contract terms). Make sure that the preexisting terms and conditions of the prenegotiated contracts are acceptable to your agency. You may need to add or modify some of the terms and conditions and you will need to put them in your Administrative Requirements. Any questions related to these changes should be referred to the DGS-PD coordinator for assistance and guidance. Develop your decision-making criteria, timelines, etc. and put your project out to bid. Once bids are received, you will need to go through a selection process and select the winning bidder. You will need to go through all the standard procedures you normally go through when conducting a bid.

You need to develop your justification as to how you will make your award. These criteria should be identified in the RFP. (A summary of the reason must be submitted to DGS-PD with your MAC Contracting Report. You are not required to select the bid response that is the least costly. Just be sure to explain how your selection process will be done in the RFP so bidders understand your selection process and can bid accordingly.

As a recommendation for your RFP, you should require the bidders to explain their approach to your project. Ask them what successes they have had in past projects. While they have already responded to a detailed RFP to be included in this contract, which had them demonstrate their experiences, you should ask for whatever background information is specifically of interest to your agency. You can ask for references that are for projects similar to your project. You should also ask for detailed resumes for key personnel, such as the project manager that they will be assigning to your project. Of course, you will want to ask for pricing and define your timelines for the bidding process, as well as the due dates for your system implementation. Finally, keep in mind that you can always review the detailed bid response that the contractor provided to DGS-PD when competing for inclusion in the pool. Reviewing their response will let you see exactly which specific technical capabilities the contractor possesses, as well as how their references rated them. It will also provide you additional insight to their past projects.

The following two items are noted for your consideration and possible inclusion in your bid.

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Performance Bonds: Your agency is free to require a bond as part of your specific project requirements. The contractors in the pool have agreed that they will provide a bond if required for a specific project.

DVBE Requirements: Because Contractors were not guaranteed of any specific quantity of work from this contract, bidders were not required to make DVBE subcontractor commitments as part of this procurement. However, your agency may choose to require DVBE subcontracting goals for your specific project. If you so chose, you should include the appropriate language and forms in your Administrative Requirements.

Be sure that you have received all appropriate departmental and agency approvals (including Department of Finance and Department of Information Technology) as you proceed through your project.

Suggested format for your RFP.

1. Cover Letter, Due dates, contact people, how award will be made., number of copies of responses, etc.
2. Description of your current situation and what you hope to accomplish in the desired solution.
3. Any Additional Administrative Requirements
4. Technical Requirements (Statement of Work) ***IT IS HIGHLY RECOMMENDED THAT YOU CONSIDER A PHASED APPROACH TO YOUR PROJECT, TO REDUCE RISK. (It is suggested that you do not pay the contractor until each phase is accomplished to your satisfaction.)***
5. Pricing

Once you have created your RFP, you should take the following steps.

1. Send your RFP to the pool of contractors (Category I and/or II) for them to respond to. You may not use this MAC to award projects to contractors who are not listed. Your RFP can be sent via e-mail if you chose. An e-mail address is included for each contractor in the pool.
2. Evaluate each contractor's response. Insure that their Project Manager has the experience you require. You are free to contact any references they have provided, or attend a demonstration of their past work.
3. Conduct any additional necessary interviews and check references to assure yourself of the contractor's capabilities to satisfy your needs.
4. Make your selection. Be consistent with the selection criteria you stated in your RFP. You should send a "Notice of Intent" to all responding bidders, identifying your intended awardee.

***THERE IS NO PROTEST ALLOWED ON THE AWARD, PER THE REQUIREMENTS ESTABLISHED FOR INCLUSION IN THE CONTRACT. YOU DO NOT NEED TO ALLOW AN OPPORTUNITY FOR***

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***BIDDERS TO PROTEST THE SELECTION OF A CONTRACTOR. THEY HAVE WAIVED THAT RIGHT WHEN RESPONDING TO THE ORIGINAL BID THAT ESTABLISHED THIS CONTRACT. HOWEVER, YOU SHOULD ALLOW A CHANCE TO PROTEST THE REQUIREMENTS OF YOUR BID.***

Complete a GSOP-206 EPQ form or local agency equivalent. Attach the contractor's bid response to it, as it will become your formal scope of work, and as such, part of the contract. Obtain all required final approvals prior to the contractor's commencement of work. These approvals are to be recorded in box numbers 15, 16 & 17 on GSOP-206-EPQ or local agency equivalent.

5. Complete the MAC Hiring Activity Report, and submit it along with a completed GSOP 206-EPQ, or local agency equivalent as noted in Section IV.

#### **B DISTRIBUTION – MULTIPLE AWARD CONTRACT ORDER-FORM GSOP-206-EPQ.**

You will need to complete the GSOP 206-EPQ form or local agency equivalent and distribute it in the following manner:

1. A copy with original signatures of the MAC order, GSOP-206-EPQ or local agency equivalent and the MAC Hiring Activity Report must be sent to:

Department of General Services  
Major Acquisitions  
Attention: E-Commerce / E-Government Coordinator  
1823 14th Street, Room 204  
Sacramento, CA 95814.

2. A copy with original signatures of the MAC order, GSOP-206-EPQ or local agency equivalent must be sent to:

State Controller's Office  
Claims Audit Unit  
3301 C Street, Room 1404  
Sacramento, CA 95816.

3. Send a GSOP-206-EPQ or local agency equivalent with original signatures to the contractor.

4. Keep a copy with original signatures on file for your records.

#### **C. NO ACCEPTABLE CONTRACTORS**

If your agency declines all proposals from the various contractors or is unable to find an appropriate contractor during the review process, your agency may utilize any other procurement process available to your agency. You should inform the contractors so that they can coordinate their resources accordingly. You are not under any obligation to make an award from the RFP you issue.

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**D. CONTRACTOR TIME REQUIREMENTS**

1. Contractor must provide the requesting agency, in one single submission, the proposal or additional information requested within the time allowed by the agency. The contractors understand that response times could be very short.
2. Contractor personnel shall not commence work until authorization has been received from the authorized approval authority. (Signed off in Boxes 15, 16, 17).

**E. TERMINATION**

Orders may be terminated for the following reasons:

1. An agency may terminate a project and be relieved of the payment of any consideration to the contractor if the contractor fails to perform in the manner specified in the contract.
2. The State may terminate any contractor's entire MAC contract without penalty to the State if that contractor offers personnel that do not meet the minimum qualifications and/or requirements stated in this contract.
3. Should it be found that contractor provided personnel that do not possess the skills required or have work habits, which do not conform with those normally required of State personnel they must be replaced with personnel that meet the State's requirements. If the contractor continues to provide personnel that do not meet the State's requirements, the State may terminate the contractor's entire MAC without penalty to the State.
5. An agency may terminate specific contractor personnel for any reason, including breach of security, unacceptable business conduct, or incompetence, within three (3) working days of notification by the agency. The contractor should be given the right to replace such personnel. There shall be no penalty to the agency for such early termination.
6. If an agency wishes to terminate an order after an order has been awarded, the agency must complete another GSOP-206-EPQ and check the termination block in box number 7 or local agency equivalent. This order should then be processed the same as a new order.

**F. AMENDMENTS**

An amendment is required if the scope is changed, cost increases or if the dates change significantly.

Agencies may amend a MAC order by completing another GSOP-206-EPQ, or local agency equivalent, noting the amendment number in box number 4, and checking the Amendment block in box number 7.

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#### **G. AGENCY REPORTING REQUIREMENTS**

If a contractor is performing in an outstanding manner, or problems are encountered, agencies are encouraged to complete a Project Completion / On-going Performance Report, Page IV - 7 and send it to the Department of General Services Procurement Division.

Agencies can request access to this information during the hiring and selection process.

#### **H. OTHER CONDITIONS**

##### **1. Contractor Requirements**

a. Contractor personnel shall perform their duties at mutually agreeable location and time. Expect contractors to do the majority of their work away from your location.

b. Contractor personnel must be available to interview and work statewide. Contractor costs related to items such as travel and per diem are the contractor's responsibility. An agency shall not pay for such costs as part of this contract nor as a separate item.

c. The State reserves the right to disapprove the continuing assignment of contractor personnel provided under this MAC. If the State exercises this right, the contractor must terminate the personnel from the individual order within three (3) working days of notice by the State.

d. The contractor will make every effort consistent with sound business practices to honor the specific requests of the agency with regard to assignment of its employees; however, subject to Section II.H.1.e, the contractor reserves the sole right to determine the assignment of its employees. If a contractor employee is unable to perform due to illness, resignation, or other factors beyond the contractor's control, the contractor will make every reasonable effort to provide suitable substitute personnel. If such replacement personnel are not made available within ten (10) working days, another contractor will be asked to replace these persons. The contractor may not otherwise substitute personnel without the agency's prior written consent as evidenced from an approved amendment to the MAC order. The agency will not unreasonably withhold consent.

e. In recognition of the fact that contractor personnel providing services under this agreement may perform similar services from time to time for others, this agreement shall not prevent contractor from performing such similar services or restrict contractor from using the personnel provided under this agreement, providing that such use does not conflict with the performance of services under this agreement.

f. Contractors must report on a quarterly basis to the DGS contact all contracts being worked on as a result of this MAC. The format of the report shall include the following information: Agency Order Number, Agency Name, date the

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project began, contractor hired, date the project ended (if done), the total cost for their services. It is highly recommended that copies of any bills that the contractor sends the agency be included as further backup documentation. Failure to report this information may result in the termination of the MAC.

g. When the project is completed, a final report must be sent to the DGS contact, stating that the project is completed, and include a summary of the work accomplished. The format of the report shall include the following information: Agency Order Number, Agency Name, date the project began, contractor hired, date the project ended, the total cost to the state or local agency.

#### **2. Agency Requirements**

a. The agency is not responsible for providing office working facilities or equipment necessary for contractor performance under this agreement.

b. The MAC order will specify the agency individual responsible for overseeing the contractor's performance and completion of the requested services and to whom all communications relative to those services should be addressed.

c. Delay or failure by the agency to fulfill the above described responsibilities, such that the contractor is prevented from performing in accordance with the applicable MAC order and supporting documentation, may result in deviations from previously agreed upon work schedules. Should the contractor determine that a delay exists, or is probable due to failure of the agency, the contractor will notify the agency in writing immediately. Communications should be addressed to the agency representative named in the MAC order.

d. The State of California Contact (Section I.G) at the Department of General Services Procurement Division is the individual to whom all communications relative to this agreement will be addressed in cases where issues cannot be resolved.

e. The Agency must submit to the State of California contact, a copy of all completed and approved GSOP 206-EPQ and the MAC Contracting Report forms or local agency equivalent, when the project begins. Included with this report must be the Contractor name, Agency Bill Code, and Agency Order Number.

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**PREQUALIFIED CONTRACTORS  
AND THEIR CONTRACT NUMBER**

You will need the following information when placing your order.

**CATEGORY I**

<b>CONTRACTOR NAME</b>	<b>CONTRACT NUMBER</b>
Genesis Data	EPQE-00-70-0024
Hewlett-Packard Company	EPQE-00-70-0025
Hitachi Data Systems Solution Corp.	EPQE-00-70-0026
Internet Business Integrators	EPQE-00-70-0035
McDowell Consulting, Inc.	EPQE-00-70-0042
Net Team, Inc.	EPQE-00-70-0043
O'Brien High Tech Industries	EPQE-00-70-0045
Silicon Finance, LLC	EPQE-01-70-0081
Technology Managers	EPQE-00-70-0055
The Huebner Group	EPQE-00-70-0027
Tier Technologies, Inc.	EPQE-00-70-0056

**CATEGORY II**

<b>CONTRACTOR NAME</b>	<b>CONTRACT NUMBER</b>
Bask Computers	EPQE-00-70-0008
Consulting Services, Inc.	EPQE-00-70-0015
Gensa Cooperation	EPQE-01-70-0078
Hume Technology Solutions, Inc.	EPQE-01-70-0073
Info Pros	EPQE-00-70-0032
Infosys Corp.	EPQE-01-70-0074
Laser Link, Inc.	EPQE-00-70-0039
Logicon	EPQE-00-70-0041
Soffia Technologies	EPQE-01-70-0076
US Data Management	EPQE-00-70-0059
Vision One	EPQE-00-70-0061
Visionary Integration Professionals	EPQE-00-70-0062
Waltrip & Associates	EPQE-00-70-0063

**E-COMMERCE / E-GOVERNMENT SERVICES**  
**ORDERING PROCEDURES**  
**PROJECT COMPLETION FORMS**

**A. THE MULTIPLE AWARD CONTRACT ORDER FORM**

Make sure all sections are completed. A blank order form follows this narrative. A copy of the completed form will be sent to the selected contractor, along with DGS and other agencies as explained below.

1. Service Requested By: Enter the agency name, address and person requesting services.
2. Mail and Bill To: Indicate the agency name, address and person that you want to appear on the invoice.
3. Agency Billing Code Insert the agency billing code as assigned by the Department of General Services in this field. Use only one billing code on the form. Local Agencies without an Agency Billing Code can get a code by calling (916) 323-1030. Once a local agency is assigned a billing code, it can be use on all future orders.
4. Agency Master Agreement Order Number Place your agency order number in this field.
5. Contractor Name, Address, Number and Service Period Enter the contractor name and address, FEIN and date the contract will start. This field will be completed after selection of a contractor. (Section IV).
6. Date Enter the date the order is filled out.
7. Type of Order Check the New box if this is the first time this service has been requested. Check the Amendment box if this order has changed from the original request for services. Check the Termination box if the order has been terminated.
8. Agency User/Project Contact Enter the individual's name and telephone number. This is the agency contact person who has knowledge of the type of work that needs to be done and will be the person coordinating the project.
9. Services to be Performed. Explain what the contractor is being contracted to do. Be as specific as possible.
10. Budget Category List the Budget Category your project falls into.

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11. Subcontractors and or DVBE Participation. List any subcontractors. If there is DVBE participation, state the DVBE commitment from the RFP response.
12. DVBE Address. Provide a complete mailing address for any DVBE firms.
13. Certification of Compliance with S.A.M. Section 4819.41 and 4832. If contracts will be more than \$10,000, a certification is required in most cases.
14. Total Cost This figure is to be the total of the contract amount. This is to be the total amount of compensation the contractor receives from this contract, and should reflect any changes to the amount made by amendments to the contract.
15. Department Approval Original signature of the agency officer authorizing expenditures of funds and date of approval is included in this section.
16. Signature of Personnel Officer Original signature of the Personnel Officer and date of approval is included in this section.
17. Signature of Accounting Officer Original signature of the Accounting Officer and date of approval is included in this section. This box is to be completed after the evaluations are done and the Agency decides to proceed with the contractor.
18. Appropriation of Funds The Accounting Office will include appropriate fiscal information indicating the appropriation, encumbrance of funds and budget information. When the Accounting Officer signs off, this field is to be completed. This box is to be completed after the evaluations are done and the Agency decides to proceed with the contractor.

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#### **B. MAC CONTRACTING REPORT FORM INSTRUCTIONS**

This form is to be completed after award of a project under this MAC. It should be sent to DGS-PD along with a signed GSOP –206-EPQ.

- Agency Name: Enter the name of your agency.
- Agency Order Number: Enter the same number as you entered in block 3. of the MAC order.
- Contact Person: Enter the name of the individual who may be contacted should there be questions about the MAC order.
- Phone Number: Enter the phone number of the Contact Person.
- Budget Category: Enter the Budget Category of this project.
- Name of the Selected Contractor: Enter the name of the Contractor that was selected for this MAC order.
- Subcontractor Names Enter the names of any subcontractors that will be used on your project. Identify if any of them are DVBE firms. If there are DVBE firms, indicate the amount of money the DVBE will be receiving.
- Summary of responding bidders Identify the names of the firms who were not selected for this contract.
- Why was the Selected Contract chosen for award? Provide a brief explanation of why this contractor was selected over the other contractors.

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**MAC CONTRACTING REPORT FORM**

Agency Name: \_\_\_\_\_ Agency Order Number: \_\_\_\_\_  
Agency Contact Person: \_\_\_\_\_  
Agency Contact Person Phone Number: \_\_\_\_\_

Budget Category of Project: \_\_\_\_\_

Name of the Selected Contractor: \_\_\_\_\_

List any subcontractors that the Prime contractor will be utilizing:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Identify and include below and continue on a separate sheet (if necessary), the names of the other firms which submitted a response to your RFP.

Use the following space to provide an explanation of how this contractor's proposal provides the most value effective services to the your agency.

\_\_\_\_\_

\_\_\_\_\_

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**C. PROJECT COMPLETION / ON-GOING PERFORMANCE REPORT**

The form on the following page is to be completed when the project is completed, or to report problems on an on-going project. Its contents may be made available to other agencies seeking information regarding the contractor. The form is to be forwarded to:

State of California  
Department of General Services  
Procurement Division  
Major Acquisitions  
MAC Coordinator for E-Commerce and E-Government  
1823 14th Street  
Sacramento, CA 95814

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**PROJECT COMPLETION/ ON-GOING PERFORMANCE REPORT**

PROJECT IS COMPLETED \_\_\_\_\_ PROJECT IS STILL ONGOING \_\_\_\_\_

**1. GENERAL INFORMATION**

Date Project Began \_\_\_\_\_ Date Project was completed (if completed) \_\_\_\_\_

Agency Name: \_\_\_\_\_ Contractor Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Order Number: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date this report is submitted. \_\_\_\_\_

**2. OVERVIEW OF PERFORMANCE**

General Description of project: (i.e.: What was the contractor hired to do/)

Problems encountered: (Please be specific and detailed.)

**3. SUMMARY:**

Overall, were you satisfied with the contractor? Yes \_\_\_\_\_ No \_\_\_\_\_

Would you use this contractor again? Yes \_\_\_\_\_ No \_\_\_\_\_

Would you recommend this contractor to another agency? Yes \_\_\_\_\_ No \_\_\_\_\_

If no, on either of the above, please explain:

**4. DOES DGS- PD NEED TO ASSIST YOU WITH PROBLEM RESOLUTION?**

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MODEL CONTRACT