

Provide responses that are thorough and complete or this Request may be returned unapproved.

- 1. Briefly describe the solicitation process to be used (IFB/RFP) and what phases will be utilized for this procurement. Provide a list of the procurement's key action dates that includes the date for advertising in the CSCR. Note that the solicitation may not be advertised until this Request and the solicitation are approved by TAS. See SAM 5212 – 5216.**

- 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.**Note:** If the evaluation methodology is not completely developed, provide enough narrative to explain the intent. See SAM 5220, 5221, PCC 12100.7 & 12102(b)

- 3. 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.

- 4. What kind of contract security document (i.e., Letter of Bondability (Surety Bond), or performance bond) is required by the solicitation? What percentage of the estimated value of the procurement does the security document represent (*if progress payments, cannot be less than 50% pursuant to PCC 12112 (IT)*)? What were the considerations in selecting the type of security document?**

- 5. How will the department ensure that the process for competition is open and competitive? What methods will be used to solicit competition? Will a Request for Interest (RFI) be used? What is the process for the RFI?**

- 6. Is there potential for California certified small businesses (SB) and disabled veteran business enterprises (DVBE) to participate in this solicitation? How will the solicitation be structured to facilitate participation by SB's and DVBE's? If DVBE participation is being waived, submit copy of document from department director or designee that DVBE has been waived.**

- 7. Describe the State's procurement project management team for the solicitation. List the key personnel by name and title and include their procurement experience (do not just state the # of years). 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 most current version of the GSPD 401IT General Provisions or RFP Section II, as applicable, must be incorporated into the solicitation. In addition, the most current version of the State's information technology contract language modules must be incorporated into the solicitation. The General Provisions, Section II, and modules may not be modified. Requests for changes must be made in writing and be approved by DGS/PD prior to releasing the solicitation. A department's specific business needs should be included in the IT Special Provisions module along with other additional project specific, unique language, including a Statement of Work. **Note: The contract language including the Statement of Work must be included with the submittal of the solicitation to TAS.**

CHECK SPECIFIC BUSINESS NEED THAT APPLY TO THIS IFB/RFP:

- Purchase Special Provisions
- Maintenance Special Provisions
- Software Special Provisions
- Personal Services Special Provisions
- Agency Special Provisions
- Statement of Work

10. Are there any political issues that could affect the solicitation process or the outcome of the solicitation?

11. Have all required Project Approvals been received (i.e., Department of Finance (FSR Approval Letter), ITPP, 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 # _____

12. Describe any other significant factors affecting this project.