

**“Template”**

*(Note: All informational text in italics should be removed prior to release to suppliers. This template may be used for both California Multiple Award Schedule (CMAS) and Master Agreement (MA) Requests for Offer. Users should refer to individual CMAS or MA User Instructions).*

**REQUEST FOR OFFER**

**RFO #:** \_\_\_\_\_  
*(Insert department assigned RFO number)*

**For:**

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(Insert name of project or other RFO identifier)

**Leveraged Procurement Agreement Exemption Request (LPAER) No:**

\_\_\_\_\_  
*(Note: This is for IT MA's only. If this RFO will exceed the \$\$ threshold of the MA, insert the DGS/PD approved LPAER # here)*

**For:** \_\_\_\_\_  
*(For CMAS insert the product and/or services category name.)*  
*(For Master Agreement insert the MA title.)*  
*(Note: this is NOT a contract number)*

Date: \_\_\_\_\_

**You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these goods and/or services, you must comply with the instructions contained in this document as well as the requirements stated in the State's Scope of Work (SOW), Attachment A and B. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO and your proposed MA or CMAS contract.**

**Read the attached document carefully. The RFO due date is:** (insert the day/month/year and time as found in the attached document). **Responses to this RFO and any required copies must be submitted by** (Identify the acceptable response method, i.e. mail, fax or electronic mail), **clearly labeled to the department contact noted below.**

**Department Contact:**

(Department Contact name)  
(Department name)  
(Department Address)  
(Contact phone #, fax #, & email address)

# Request for Offer

## General Information

### 1. Background and Purpose of the RFO

*(The department should provide enough information here to entice the reader to provide a response. This section should reference more detailed information to be found in the State’s Scope of Work (SOW). Other pertinent information to be included here are targeted start dates and estimate timeframe for project duration.)*

### 2. Key Dates

It must be understood that time is always of the essence, both for the RFO submittal and contract completion. Offeror’s are advised of the key dates and times shown below and are expected to adhere to them.

<u>Event</u>	<u>Date</u>
1. Release of RFO	_____
2. RFO Response Submission Due date (and time)	_____
3. State Review of RFO Submissions	_____

### 3. RFO Response Requirements

This RFO and the offeror’s response to this document will be made part of the ordering department’s *STD.213 Contract or STD.65 Purchasing Authority Purchase Order* and procurement contract file.

Responses must contain all requested information and data and conform to the format described in this section. It is the offeror’s responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the offeror’s ability to perform the tasks and activities defined in the State’s Scope of Work, Attachment A and Cost Worksheet, Attachment B provided as required below.

The offeror must submit XX copies of their response to the department contact name and address contained on the cover sheet to this RFO.

Departments must offer procurement opportunities to California (CA) certified SB, MB, and DVBE, whenever possible. See attached Bidder Declaration (GSPD 05-105) to allow suppliers to identify if they are a DVBE and identify DVBE subcontractors, their proposed contract function and the corresponding percentage of participation.

Click here to access the [Bidder Declaration Narrative](#).

Click here to access the [Bidder Declaration, GSPD 05-105 – Written Version](#).

### 4. RFO Response Content

The majority of the information required to respond to this RFO is contained in the State’s Scope of Work, Attachment A and Cost Worksheet, Attachment B.

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a) Response to State’s Scope of Work, Attachment A:

*(The following is an example of items that may be required in the State’s Scope of Work and some of these may be more suited to services than to goods).*

The offeror’s “Statement of Work” responds to the State’s Scope of Work and will be used to evaluate responsiveness to requirements. This Statement of Work response must map each task/deliverable item back to the Attachments. The response must include any additional information that the offeror deems

necessary to explain how the Contractor intends to meet the State’s requirements. The Statement of Work needs to contain the following as appropriate:

1. Overview of the required tasks and outcomes,
2. Description of how the tasks will be performed,
3. Work plan for each task, including sub-task description, including due date for each deliverable,
4. Samples of work from other projects, or outlines of what deliverables are proposed for the required Tasks,
5. Organization chart that identifies the proposed contract team,
6. Resumes for each identified member of the contract team, detailing experience meeting the State’s requirements,
7. Any other requirements shown in the State’s Scope of Work document. *(Note: If the department will allow use of subcontractors, then the Scope of Work must require the offeror to list the firm name, address, contact person and address. Subcontractors are subject to all the terms, conditions and requirements of this subsequent contract.)*

b) Response to Attachment B

5. Contract Award

Award of a contract resulting from this RFO will be based on a best value. *(Refer to the User Instructions for language to include for both types of methods and for information on how the methods will be used. This language must **NOT** be changed.)*

**Review of Offers for Award**

Responses to this RFO will first be reviewed for responsiveness to the all requirements of Attachments A and B, and any other Attachments. If a response is missing information required in any Attachment it may be deemed not responsive.

## Request for Offer

### ATTACHMENT A – SCOPE OF WORK

*(At a minimum use this outline to detail the requirements of this Request for Offer. Based on the information in this Scope of Work, suppliers making an offer will use this document to prepare and submit their Statement of Work to respond to this RFO. The SOW must include any confidentiality, information, security, and conflict of interest requirements that may be unique to the department’s mission or internal policies.)*

- A. **Scope and Description** – *this is the how, who, what, when and where*
- B. **Contractor Tasks and Responsibilities** – *list tasks the Contractor must perform*
- C. **Deliverables** – *list expected deliverables, i.e., reports, meetings, committee assignments, etc. with due dates, hours per task, amounts per task. These deliverable descriptions will be used to judge acceptance and when accepted will be used to justify payment.*
- D. **Acceptance Criteria** – *When applicable include language such as “It shall be the State’s sole determination as to whether a deliverable has been successfully completed and acceptable to the State. There must be a signed acceptance document for each deliverable before invoices can be processed for payment.”*

*Acceptance criteria shall consist of the following:*

- 1. *Reports on written deliverables are completed as specified and approved.*
- 2. *All deliverables must be in a format that can be used by the State.*
- 3. *If a deliverable is not accepted, the State shall provide the rationale in writing within (number of days) days of receipt of the deliverable or upon completion of acceptance testing period.*

- E. **Other Reporting Requirements**
  - 1. *On a (weekly or monthly) basis, each contractor staff person shall complete a timesheet.*
  - 2. *The contractor will develop and provide ad hoc reports as deemed appropriate and necessary by the State.*
- F. **State Responsibilities**

*Provide access to business and technical documents as necessary for the contractor to complete the tasks identified in the department’s purchase document.*
- G. **Travel**

*If travel reimbursement is allowed by the CMAS or MA contract, the awarding department may agree to travel reimbursement in the RFO. Travel costs are to be specifically identified and reimbursement will be limited to rates published by the Department of Personnel Administration.*

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### ATTACHMENT B – COST WORKSHEET

*(This worksheet is an example of how a department should request costs for a consulting services Request for Offer. Suppliers will use this document to prepare their costs. Types of classifications will vary depending on the project.)*

Job Title or Classification	Task	Hours	Rate Per Hour	Extended Total	Name of Employee

Subtotal \$ \_\_\_\_\_

Other Costs, Travel, (if allowed) etc. + \_\_\_\_\_

**Total Costs** \$ \_\_\_\_\_