

# Add Contract (continued) SCPRS February 18, 2003

**Contracting Method\*** - Required Field; pull-down box  
Use the pull-down listing for **Contracting Method** to select the method used for this contract/procurement. The system defaults the value of the contract type to the first item on the list, i.e., 1 - Competitive Bid (CB).

(Contracting Method item 7 – Categorically Exempt will be changed to 'Special Category NCB'.)

The screenshot shows the 'Add Contract' form with the 'Contracting Method' dropdown menu open. The menu lists 11 options: 1 - Competitive Bid (CB), 2 - Non-Competitive Bid (NCB), 3 - Master Agreements (MA), 4 - CMAS, 5 - Emergency, 6 - Statutorily Exempt, 7 - Categorically Exempt, 8 - CB-GC 14838.5, 9 - CB-Formal, 10 - CB-Informal, and 11 - CB-Request for Qualifications (A&E). The 'Contract Type' is set to '1 - IT Goods'. Other fields include 'Dept./Agency Name', 'Sub-Unit Name', 'Original Entry Date', 'Contractor Name', 'Vendor FEIN', 'Small Business', 'Original Beginning Term', 'PIN No.', 'Financed or Leased', and 'Leveraged Contract No.'. A 'Submit' button is visible at the bottom right.

The screenshot shows the 'Add Contract' form with a different 'Contracting Method' dropdown menu open. The menu lists 18 options: 1 - Competitive Bid (CB), 8 - CB-GC 14838.5, 9 - CB-Formal, 10 - CB-Informal, 11 - CB-Request for Qualifications (A&E), 12 - MA-Pre-Qualification Agreements, 13 - MA-Statewide Commodity Contracts, 14 - MA-State Price Schedule, 15 - MA-Master Services Agreement, 16 - MA-Master Rental Agreement, 17 - MA-Master Purchase Agreements, and 18 - A&E-G.C. 4525. The 'Contract Type' is set to '1 - IT Goods'. Other fields are the same as in the previous screenshot.

This box permits the user to select from a list of choices for contract type. One of the choices **must** be selected. (If you feel that you need a choice that is not available, please send a message to the SCPRS staff through the Feedback link.)

## 1 - Competitive Bid (CB)

As described in the State Contracting Manual § 5.08:

A. Three competitive bids or proposals are required unless one of the following applies:

1. Emergency. The work or service is for the immediate preservation of the public health or welfare, or the safety or protection of state property (PCC §§ 1102 and **10340**).
2. **The contract is exempt from being competitively bid as listed in SCM 5.80.**
3. Sole source exemption. The Director of DGS has approved exemption from competitive bidding because the state's best interests are better served by exemption (SCM 5).
4. Governmental agency contract. The contract is with another state, local, or federal agency or with the University of California, the California State University, or a California community college or any of their auxiliary organizations (PCC § **10340**).

Note: These contracts or interagency agreements cannot be used to circumvent or bypass the state's bidding requirements, SCM 1 and 3.

5. Community Based Rehabilitation Program (CRP). The exemption applies for workshops conducted in accordance with W&I Code §19404.
6. Services for which the State has entered into a master contract.
7. When the agency awarding the contract has advertised the contract in CSCR and has solicited all potential contractors known to the agency but has received less than three bids or proposals.

## 2 - Non-Competitive Bid (NCB)

A good/service/supplier that is documented as being the **only** good/service/supplier able to meet the specified goods or IT goods and services needs of a State department.

Information is also available in Management Memo 02-19 located at the Procurement Division's web site <http://www.dgs.ca.gov/pd>.

## 3 - Master Agreements (MA)

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.

1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the

use of a subscription agreement, typically using a Standard Agreement Form.

2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

#### **4 - CMAS**

California Multiple Award Schedule (CMAS) – Orders issued against DGS/PD developed CMAS agreements.

The CMAS contracts are established using products, services and prices from already existing competitively assessed and cost compared multiple award contracts. The products, services and prices are primarily from the federal General Services Administration (GSA) multiple award schedule program Federal General Services Administration (GSA) but not exclusively. To these products, services and prices, we add California contract terms and conditions and procurement codes and policies and establish a totally independent California contract.

The contracts are utilized statewide by both California State and local government agencies under delegated authority from the Department of General Services. Agencies make best value purchasing decisions according to their own business needs such as price, warranty, and supplier performance.

As defined in Public Contracting Code: PCC 10290(j) "Multiple award schedule" (MAS) is an agreement established between the General Services Administration of the United States and certain suppliers to do business under specific prices, terms, and conditions for specified goods, information technology, or services.

### 5 - Emergency

Emergency is defined in PCC §1102 as "a sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services."

### 6 - Statutorily Exempt

Contract exempt by statute. Contracts exempt by statute are described in Management Memo 02-19 located at the Procurement Division's web site <http://www.dgs.ca.gov/pd>.

### 7 - Special Category NCB (formally named Categorically Exempt)

Contracts exempt by DGS policy are described in Management Memo 02-19 located at the Procurement Division's web site <http://www.dgs.ca.gov/pd>.

### 8 - CB-GC 14838.5

Competitive Bid (CB) – Government Code 14838.5 – Awards made to California-certified small business/Disabled Veteran Business Enterprise contractors pursuant to GC 14838.5.

14838.5. (a) Notwithstanding the advertising, bidding, and protest provisions of Chapter 6 (commencing with Section 14825) of this **code** and Chapter 2 (commencing with Section 10290) and Chapter 3 (commencing with Section 12100) of Part 2 of Division 2 of the Public Contract **Code**, a state agency may award a contract for the acquisition of goods, services, or information technology that has an estimated value of greater than five thousand dollars (\$5,000), but less than one hundred thousand dollars (\$100,000), to a certified small business, including a microbusiness, or to a disabled veteran business enterprise, as long as the agency obtains price quotations from two or more certified small businesses, including microbusinesses, or from disabled veterans business enterprises. (b) In carrying out subdivision (a), state agencies shall consider a responsive offer timely received from a responsible certified small business, including a microbusiness, or from a disabled veteran business enterprise. (c) If the estimated cost to the state is less than five thousand dollars (\$5,000) for the acquisition of goods, services, or information technology, or a greater amount as administratively established by the director, a state agency shall obtain at least two price quotations from responsible suppliers whenever there is reason to believe a response from a single source is not a fair and reasonable price.

## 9 - CB-Formal

CB - Formal – Formal competition, based on the following:

- IT Goods and Services -- >\$500,000
- Non-IT Goods (Commodities) -- >\$25,000
- Non-IT Services -- >\$50,000

As described in the California Acquisitions Manual § 3.2.2.b.5:

A written solicitation, including either Information Technology (IT) model contract language or General Provisions, or a combination of the two, developed in accordance with established practices for relatively high dollar, highly complex procurements and in accordance with statutory requirements.

## 10 - CB-Informal

CB – Informal – Informal competition, based on the following:

- IT Goods and Services -- <\$500,000
- Non-IT Goods (Commodities) -- <\$25,000
- Non-IT Services -- <\$50,000

As described in the State Contracting Manual, § 5.05:

When services are required and the dollar amount is below (specified above) agencies should conduct a market survey of vendors and have them submit unsealed price quotes. There is no limit on the number of vendors that may be solicited. This process may be done by telephone, writing, or fax.

As described in California Acquisitions Manual § 3.2.2.b.6:

A type of solicitation that can be conducted verbally (by telephone) or in writing and used for the purchase of goods (including information technology) or information technology services of relatively low value and complexity in accordance with statutory requirements.

## 11 - CB-Request for Qualifications (A&E)

Selection for professional services of A&E consultants must be on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required at a fair and reasonable price. The Request for Qualifications (RFQ) is the solicitation document that sets out the criteria for determining the best qualified professional for the project. The RFQ process is followed in accordance with SCM 11.05 and 11.06.

## 12 - MA Pre-Qualification Agreements

Master Agreements (MA) – Pre-Qualification Agreements awarded only by DGS-PD as described in Management Memo 02-19 found at the Procurement Division's web site <http://www.dgs.ca.gov/pd>:

### **13 - MA Statewide Commodity Contracts**

Orders issued against Statewide Commodity Contracts established by DGS-PD

As defined in Public Contracting Code: PCC §10290 "Statewide contract" means a contract awarded by the Office of Procurement to one or more suppliers for the acquisition of specified goods for a period of time, at a price, and in an amount set forth in the contract.

### **14 - MA State Price Schedule**

Orders issued against Statewide Price Schedules established by DGS-PD.

As defined in Public Contracting Code: PCC § 10290:

"Price schedule" means an agreement between the Office of Procurement and a supplier under which the supplier agrees to accept orders from the office or a state agency for specified goods at set prices for a specified period of time but which does not obligate the office or state agencies to contract for the specified goods from the supplier.

### **15 - MA Master Service Agreement**

Orders issued against Master Service Agreements established by DGS-PD

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
  1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
  2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
  3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
  4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

- B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

## 16 - MA Master Rental Agreement

Orders issued against Master Rental Agreements established by DGS-PD Same benefits of a Master Service Agreement (repeated below), however a Master Rental Agreement generally includes the product, lease term options (i.e. 12 months, 24, months...) maintenance service and warranty.

As described in the State Contracting Manual §3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
  2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
  3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
  4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

- B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

### **17 - MA Master Purchase Agreement**

Orders issued against Master Purchase Agreements established by DGS-PD

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
  2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service Justification (GC §19130), and DVBE goals may or may not have been dealt with.
  3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
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authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

### 18 - A&E G.C. 4525

Qualification based contracts for Architectural and Engineering Services which are selected in accordance with the provisions of Govt. Code 4525 and State Contracting Manual, Chapter 11, et al. These services obtained through a Request for Qualification (RFQ) process to ensure the most qualified professional services are obtained by the State. The RFQ process is used to evaluate and select based upon qualifications and experience, then negotiate fees and scope of work in order to award the contract.

#### **Leveraged Contract No.**

If the **Contracting Method** is a **CMAS or Masters**, a leveraged contract number must be entered. All other contracting methods do not use a leveraged contract number. Do not use spaces between numbers. This field can hold up to 20 characters.

#### **Small Business**

Yes or No button. Defaults to **No**.

Use the **Yes** or **No** button to indicate if this is a **Certified** Small Business vendor.

#### **Disabled Veteran (not available at this time)**

Yes or No button.

#### **Micro Business (not available at this time)**

Yes or No button.

**Original Beginning-Term\*** - Required Field; quick select calendar next to box  
Enter the original beginning term of this contract. This date may differ from the Date of Entry of Original Contract.

**Original Ending Term** - Quick select calendar next to box  
Enter the original ending term of the contract. This is not the date resulting from extensions due to amendments to the original contract. For certain contract types, no entry will be required in this data field.

**Original Contract Amount\*** - Required Field  
Enter the amount of the original contract. This should **not** include amounts resulting from amendments to the original contract.

It is not necessary to add a dollar sign. If cents are omitted, the SCPRS will assume two digit zeros. If cents are included in the amount, they must be preceded with a dot, for example 2500.56. **(Instructions on Tax issue to be included.)**

The user **must** click on the gray **Submit** button in order for the data to be entered into the system and for the generation of a SCPRS Registration Number for this contract. You **must** have a registration number for each contract.

**Note:** If you were in the process of adding contract or amendment information and had not clicked on the gray **Submit** button before you logged out of the system or for any other reason, the data was not saved and will need to be re-entered.

Once the required information is submitted, the system issues a SCPRS registration number. The user is notified by a web receipt on the screen and by an email receipt. The SCPRS registration number has the following format:

4 digit numeric organizational number from Department of Finance plus a  
2 digit numeric Contract Type plus a  
4 digit numeric date in the order of Month Day Year plus a  
sequential number assigned by SCPRS.

The 4 digit numeric organization codes are assigned and maintained by the Department of Finance (DOF). Further information about the DOF codes and their uses are available at <http://www.dof.ca.gov/html/salstars/ucm.htm>. The second bullet near the bottom of the DOF page provides a link to alphabetical, numerically, or structural listings of the organization codes.

Example: 1770**10**0902**100** (bold type is not present in real number)

1770

**10**

0902

Sequential Number

DOF organization code

Contract Type (the system will use the same contract type number that was selected earlier for Contract Type)

September 2002

**100**

Once a contract has been registered, the user can add amendments to the parent contract. Each contract amendment is issued a number. A period and the amendment number will be added to the parent contract number. Example of amendment 1 for the above contract: 1770100902100.1

**This SCPRS registration number is a very important identifier for this contract and should be noted by the user for future use.**