

## Section 3a Add Contract (continued) SCPRS May 5, 2003

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

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) - THIS DEFINITION IS UNDER CONSTRUCTION**

## **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.

Refer to Management Memo 02-19 and any subsequent amendments thereto. MM 02-19 is located at the Procurement Division's web site <http://www.dgs.ca.gov/pd>.

## **3 - Master Agreements (MA) - *THIS DEFINITION IS UNDER CONSTRUCTION***

## **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 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.

## **5 - Emergency**

Emergency is defined in PCC or GC §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**

Contracts exempt by statute include those referred to in MM02-19, including any revisions thereto. Management Memo 02-19 is located at the Procurement Division's web site <http://www.dgs.ca.gov/pd>.

## **7 - Special Category NCB**

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

## **8 - CB-GC 14838.5/14838.7**

Competitive Bid (CB) – Government Code § 14838.5/14838.7

Awards made to California-certified small business, including a microbusiness, or to a disabled veteran business enterprise contractor pursuant to GC § 14838.5/14838.7. GC § 14838.5 is a simplified process that applies to the procurement of goods and services. GC 14838.7 is a simplified process that applies to construction services estimated not to exceed the project level established and adjusted periodically by the Department of Finance (\$120,000 for FY 02/03) in accordance with PCC § 10105.

## **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, § 5.95:

When non-IT 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.

Master agreements established by DGS-PD, that represent a listing of suppliers who have been pre-qualified typically on the basis of experience and financial status. Users then issue solicitations to the suppliers in pre-defined categories. Award of a contract to one of these pre-qualified suppliers is based on best value as determined by the user.

## **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.

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

Statewide Master Purchase Agreements (MPA's) are one type of Master Agreement contract bid by DGS for Information Technology products and services. These MPA's are used by many departments.

1. MPA's 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 and local agency can use the statewide MPA's through the use of a Purchase Order, Standard Agreement Form, or CAL-Card.
2. MPA's 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. MPA's allow an agency to obtain needed products and/or services quickly and easily, avoiding the delay and uncertainty of the bid process. Master Purchase Agreements 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 MPA.

4. MPA's developed by the Procurement Division, DGS, cannot exceed \$500,000 unless an exemption request is approved by DGS in advance.
5. Western States Contracting Alliance (WSCA) contracts are also considered MPA's. These contracts also have User Guides that explain how the contracts are to be used. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular 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. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

**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. The data format is month, day, year order (MM/DD/YYYY). For example: March 22, 2003 is 03/22/2003.

**Original Contract Amount\*** - Required Field  
Enter the total amount of the original contract and include tax if it is part of the total. 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.

The SCPRS system does not separately identify the tax cost for any contract, amendment or purchase orders entered. To aid in the searching, identification and reporting of SCPRS information enter the total dollar amount that is printed on the purchasing document. If tax is included in the document total, it should be included in

the SCPRS data. If tax is not included, it should not be included in the SCPRS data. With this in mind, the SCPRS Reports include tax to the extent that it was noted on the documents used to input data.

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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 did not click on the gray **Submit** button before you logged out of the system or if the system logs you off automatically as a result of the "Default" 20 minute system idle time, 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. **This is NOT the number known as the contract number.** The user is notified by a web receipt on the screen and by an email receipt. **The SCPRS registration number is an important identifier and should be noted for future use.**

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/calstars/ucm.htm>. The second bullet near the bottom of the DOF page provides a link to alphabetical, numerical, or structural listings of the organization codes.

Example: 1770**100703100** (bold type is not present in real number)

1770

**10**

0703

Sequential Number

DOF organization code

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

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**100 (this can be any number of digits from 2 digits for sequential number 12 to 4 digits for sequential number 3,421.)**

Once a contract has been registered, the user can add amendments to the parent contract. A period and the amendment number will be added to the parent contract number. Example of amendment 1 for the above contract: 1770100703100.1