

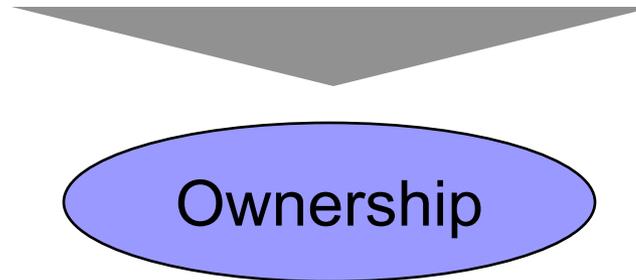
IT Hardware Enterprise eRFP # DGS 5008

Bidders' Conference

March 18, 2005

The objectives for today's bidders' conference include...

- **Access** to critical information
- **Opportunity** to understand eRFP requirements and network with potential partners
- Review the **Tools** to be used



Bidder's Conference Agenda

- **09:00 – 09:15 a.m.** **Opening Remarks**
- **09:15 – 10:25 a.m.** **Overview of eRFP # DGS 5008, including:**
 - Section-by-section Review
 - Key Action Dates
 - Submission of Mandatory and Optional Documents
 - Overview of eBreviate Technology
 - DVBE Program Requirements
 - Pricing Instructions
 - Scoring Criteria
- **10:25 – 10:30 a.m.** **Submission of Question to eRFP Panel**
- **10:40 – 12:20 p.m.** **Small Business and DVBE Partnering Workshop**
- **12:30 – 01:30 p.m.** **Question and Answer Session with eRFP Panel**

Submission of Questions to eRFP Panel

Instruction to Submit Question to eRFP Panel

- Please write your questions on the provided cards
- Follow the instructions:
 - Write only one (1) question per card
 - Identify applicable eRFP Section related to the question
 - Check the type (e.g., eTool, evaluation and award) of question
 - Please make sure the question is legible. Illegible questions will not be answered
- Attendants will collect question cards from bidders
- eRFP Panel will provide oral answers to as many questions as possible following the Partnering Workshop at 12:30 pm
- All questions will be answered in writing by March 24, 2005
- Oral responses will not be binding on the State



State of California Department of General Services	IT Hardware Enterprise eRFP # DGS 5008 Bidders' Conference - Question Form
Instructions:	
<ul style="list-style-type: none"> • Write only one (1) question per card • Identify applicable eRFP Section related to the question • Check the type (e.g., eTool, evaluation and award) of question • Please make sure the question is legible. Illegible questions will not be answered. 	
eRFP Section <input style="width: 50px;" type="text"/>	
<div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div>	
Please classify your question by checking one of the following boxes:	
<input type="checkbox"/> California Strategic Sourcing Initiative (CSSI) <input type="checkbox"/> eRFP Process and Logistics <input type="checkbox"/> Key Action Dates <input type="checkbox"/> E-Tool <input type="checkbox"/> SB and/or DVBEs <input type="checkbox"/> Administrative Requirements <input type="checkbox"/> Business and Technical Requirements	<input type="checkbox"/> Pricing <input type="checkbox"/> Evaluation and Award <input type="checkbox"/> Exhibits <input type="checkbox"/> Current Contracts <input type="checkbox"/> Request for Change <input type="checkbox"/> Other: _____

Bidder's Conference Agenda

- **09:00 – 09:15 a.m.** **Opening Remarks**
- **09:15 – 10:25 a.m.** **Overview of eRFP # DGS 5008, including:**
 - Section-by-section Review
 - Key Action Dates
 - Submission of Mandatory and Optional Documents
 - Overview of eBreviate Technology
 - DVBE Program Requirements
 - Pricing Instructions
 - Scoring Criteria
- **10:25 – 10:30 a.m.** **Submission of Question to eRFP Panel**
- **10:40 – 12:20 p.m.** **Small Business and DVBE Partnering Workshop**
- **12:30 – 01:30 p.m.** **Question and Answer Session with eRFP Panel**

Opening Remarks

Why Strategic Sourcing?

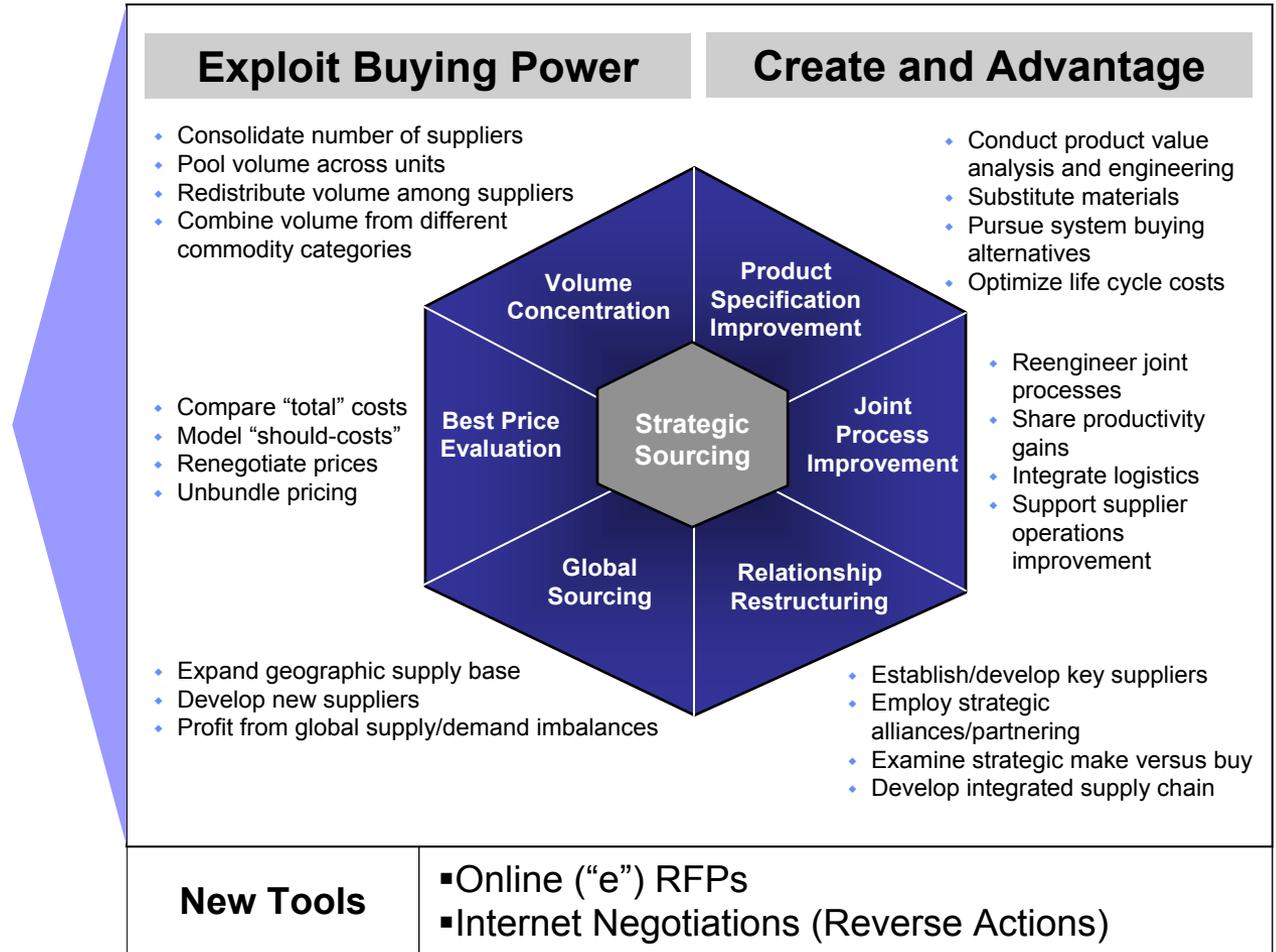
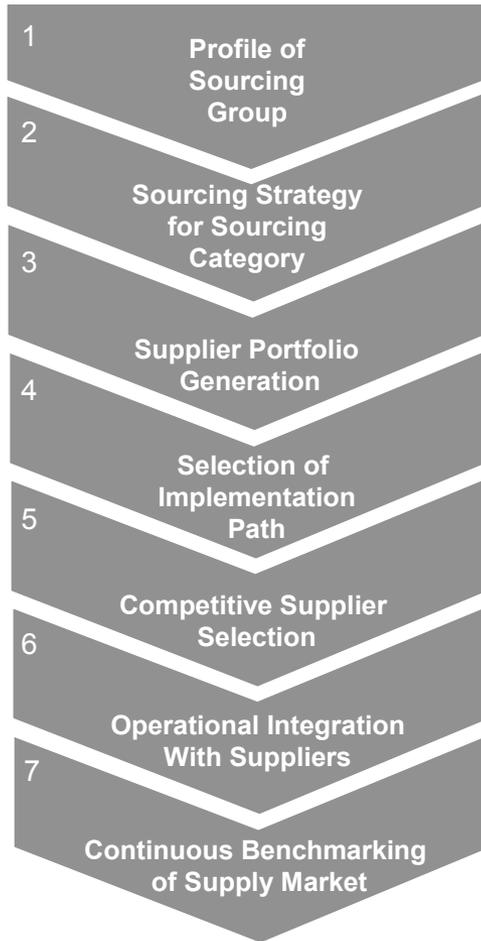
- **In 2003, The State of California was nearly \$12 Billion in the red**
- **The State continues to face unprecedented budget shortfalls**
- **In June 2004, Governor Schwarzenegger announced a plan to modernize State purchasing to provide...**
 - Best Service, Best Products, Best Value
 - Strategic Sourcing Tools

What is Strategic Sourcing?

A New Approach to Smart Buying

- **Founded in analysis**
 - What, from whom, what price
 - Market conditions and available suppliers
- **New procurement techniques applied**
 - Electronic RFPs, Reverse auctions
 - Negotiations with bidders
- **Best Services, Best Products, Best Value**

Strategic Sourcing Approaches



Overview of IT Hardware Enterprise eRFP # DGS 5008

The State of California recently issued eRFP # DGS 5008 for enterprise Unix-based servers and storage devices

■ Purpose of this Electronic Request for Proposal (eRFP)

- Elicit proposals from firms qualified to provide enterprise servers, storage devices and related services such as technical support, installation services, data migration among others.

■ Scope of the eRFP

- State agencies spend in excess of \$39 million annually on enterprise servers (37%) and storage devices (63%)
- The eRFP includes eight (8) subcategories: HP Unix-based servers, Sun Unix-based servers, IBM Unix-based servers, disk storage systems for open environments, disk storage systems for mainframe, network attached storage servers, tape devices and storage area network fabric (switches and HBAs)

■ Goal of the eRFP

- Establish a “best-in-class” procurement vehicle for enterprise servers and storage devices for all State authorized purchasers to use
- Term of the contract is for three (3) years with a maximum of two (2) additional one-year options

■ Establishing Statewide Common Configurations

- The State has established establish a set of common configurations for enterprise servers and storage devices.
- Common configurations will be updated every 6 to 12 months, to ensure the State keeps up to date with evolving technology

There are important actions, dates and times by which the listed actions must be taken or completed

	Monday	Tuesday	Wednesday	Thursday	Friday
March 2005					18 Bidder's Conference
	21 Intent to Bid Due ----- Last Day to Submit Bidder Questions	22	23	24 Responses to Bidder Questions Sent Via E-Mail	25
	28	29	30 Draft Proposal Due	31	1
April 2005	4	5	6 Last Day to Post DVBE Advertisement	7 Draft Proposal Feedback to Bidders	8
	11 Final Day to Request a Change to the eRFP Requirements	12	13 Final Proposal Due		

The Procurement Official is your only point of contact during this procurement process

- **Procurement Official**

- **Dana DeVault-Green**

- Department of General Services - Procurement Division
 - 707 3rd Street, 2nd Floor
 - West Sacramento, CA 95605

- Telephone: (916) 375-5980

- Facsimile: (916) 375-4613

- email: ddevault@dgs.ca.gov

- **For additional information, please visit:**

- <http://www.pd.dgs.ca.gov/stratsourcing>

Bidders must follow all rules governing competition for this procurement process

Key Guiding Principles

■ Identification and Classification of eRFP Requirements

- Requirements
 - Mandatory Requirements
 - Mandatory Scored Requirements
- Desirable Items
 - Non-mandatory questions

■ Proposal Submission Requirements and Conditions

- Questions, Clarifications or Request to Change the eRFP Requirements

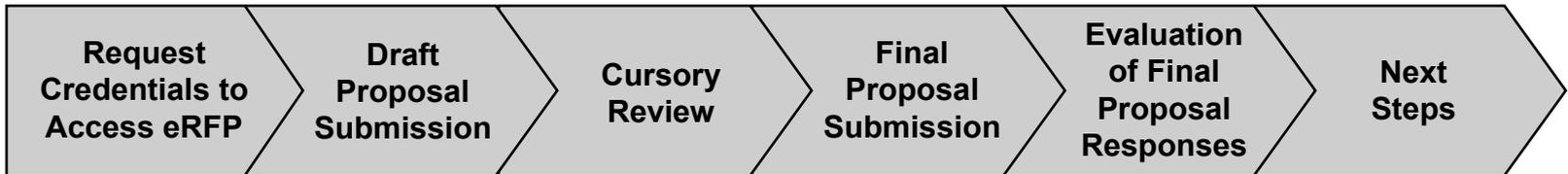
■ Proposal Submission Phases and Steps

- Draft eRFP proposal
- Final eRFP proposal

Section 2 of this eRFP provide all rules governing competition that bidders must follow

The procurement process consist of six steps that bidders must follow in accordance with the instructions of this eRFP

Procurement Process Steps



	Request Credentials to Access eRFP	Draft Proposal Submission	Cursory Review	Final Proposal Submission	Evaluation of Final Proposal Responses	Next Steps
Description	<ul style="list-style-type: none"> Respond to invitation e-mail Login credentials sent out to interested bidders 	<ul style="list-style-type: none"> Provide the State with a complete proposal but without any pricing information 	<ul style="list-style-type: none"> State will review draft proposals to identify any faulty administrative aspect of the response 	<ul style="list-style-type: none"> Must be complete in all aspects as required by the eRFP including the Pricing Proposals 	<ul style="list-style-type: none"> Identify responsible, responsive bidders Conduct Technical, Business and Cost Score Evaluation 	<ul style="list-style-type: none"> The State may: <ul style="list-style-type: none"> Award the business to bidder(s); or Conduct negotiations with selected responsive responsible bidders
Action	<ul style="list-style-type: none"> Contact the Procurement Official via e-mail 	<ul style="list-style-type: none"> Follow instructions provided in Section 3.3.G 	<ul style="list-style-type: none"> Bidders will receive feedback as appropriate via e-mail 	<ul style="list-style-type: none"> Follow instructions provided in Section 3.3.G 	<ul style="list-style-type: none"> Evaluation team calculates total score of Final Proposals 	<ul style="list-style-type: none"> Bidders to participate in next steps will be notified by e-mail
Key Action Dates	<ul style="list-style-type: none"> ASAP 	<ul style="list-style-type: none"> March 30, 2005 by 3:00 PM PST/PDT 	<ul style="list-style-type: none"> April 7, 2005 by 5:00 PM PST/PDT 	<ul style="list-style-type: none"> April 13, 2005 by 3:00 PM PST/PDT 	<ul style="list-style-type: none"> To be Determined 	<ul style="list-style-type: none"> To be Determined

Final Proposals must be complete in all aspects as required by this eRFP in order to bidders deemed responsive and responsible

List of Mandatory Items That MUST Be Submitted With eRFP Response

Documents Required	Where to Find	How to Submit
Intent to Bid	E-Tool - TOC	Via E-Tool
Letter of Acceptance	Bidder's Possession	Deliver document inside an envelope following instructions describe in Section 3.3
Confidentiality Statement	E-Tool – Section 9	
Federal Debarment Certification		
Non-collusion Affidavit		
Payee Data Record		
DVBE Program Requirements		
Completed Customer Reference Forms		
Responses to Administrative Requirements	E-Tool – Section 4	Via E-Tool
Responses to Business and Technical Requirements	E-Tool – Section 5	
Completed Pricing Proposal	E-Tool – Section 9	Deliver worksheets on CD-ROMs inside an envelope following instructions describe in Section 3.3

Bidders desiring to claim a socio-economic preference program must deliver the following documents

List of Mandatory Items if Bidder Claim Socio-economic Preference Program

Documents Required where Applicable	Where to Find	How to Submit
Small Business Enterprise Certification	Bidder's Possession	Deliver document inside an envelope following instructions describe in Section 3.3
NVSA Certification	Bidder's Possession	
TACPA	E-Tool – Section 9	
EZA		
LAMBRA		

eRFP Technology Instructions

- **For additional information or question on the eBreviate Tool, please:**
 - Contact the eBreviate Help Desk at 866-254-2745, 24x7

Bidders must comply with all administrative requirements in order to be deemed responsive, responsible

Key Administrative Requirements

Requirement	Description
Contract Terms	<ul style="list-style-type: none"> ■ Bidders shall agree to accept all terms and conditions of the General Provision— Information Technology GSPD-401IT <ul style="list-style-type: none"> •Special Purchase Provisions •Maintenance Special Provisions •Software License Special Provisions •Personal Services Special Provisions
Statement of Work	<ul style="list-style-type: none"> ■ Bidders shall agree to adhere to all the tasks and deliverables stated in the Statement of Work (SOW) in Section 9, Exhibits
Small Business Preference Program	<ul style="list-style-type: none"> ■ SBs are desired and encouraged to participate in this eRFP ■ SBs will receive a 5% preference applied to the total points scored ■ Certified NVSA will receive small business certification as well
Non-Small Business Preference Program	<ul style="list-style-type: none"> ■ Non-SB that partner with CA-Certified Small Businesses for 25% or more of the dollar value of the contract will also get the same SB preference (5%)
Prime Contractor or Use of sub- contractors	<ul style="list-style-type: none"> ■ Bidders that will use subcontractors, whether they are small businesses or not, must complete the table included in Section 4.8
TACPA, EZA and LAMBRA Preference Programs	<ul style="list-style-type: none"> ■ Bidders are not required to apply for TACPA, EZA, and LAMBRA preferences ■ Bidder desiring to claim TACPA, EZA and/or LAMBRA preference must deliver a fully completed copy of the specific Standard Form described on Section 4.11

Bidders must meet goal attainment or demonstrate good faith effort to be deemed responsive to the DVBE Participation Program

DVBE Program Requirements Supplier Checklist

▪ Option A: Commitment to DVBE Contract Participation

- STD 840 included with bid

- DVBE Written Agreement

- Designated the Commitment Option – Checked the first box

- Listed at least one California certified DVBE subcontractor

- Checked the box(es) for “Yes ...”

- Listed specific goods and/or services DVBE(s) agrees to provide

- Proposed DVBE contract performance is a “commercially useful function” relevant to the contract

- Listed the estimated dollar amount and/or percentage of contract for the DVBE’s participation

- Proposed DVBE participation meets the 3% requirement (unless a different percentage is specified)

- Attached a copy of the DVBE’s certification letter from the Department of General Services

Bidders must meet goal attainment or demonstrate good faith effort to be deemed responsive to the DVBE Participation Program

DVBE Program Requirements Supplier Checklist

▪ Option B: Good Faith Effort (GFE)

- STD 840 included with bid

- Designated the GFE Option – Checked the second box

- (Step 4) Listed all DVBEs contacted and invited to perform on the proposed contract

- Confirmed that listed DVBEs are California certified

- Attached copies of the invitations sent to the listed DVBEs

- Invitations included the required contact information

- Attached copies of the delivery confirmations for invitations to DVBEs (e.g. mail receipts, fax confirmations, etc.)

- (Step 5) Checked the “No” boxes and listed the business reasons for non-selection of DVBEs contacted

- (Step 1) Contacted the Awarding Department and listed contact and results

- (Step 2) Contacted Other State agency (Office of Small Business and DVBE Certification) and listed the contact and results

- (Step 2) Searched the Federal Pro-net internet database and noted the results

- (Step 2) Contacted Local DVBE Organization(s) and listed the contact and results

- (Step 3) Advertised – IF NOT WAIVED
Listed full information for the advertisement(s) and publication(s)
[2 ads in one trade and in one DVBE focus publication; **OR** 1 ad in one dual-purpose publication]

- Attached a copy of the advertisement(s)

- The advertisement(s) were published at least 7 days prior to the bid due date

- The advertisement(s) included my required contact information

The State has defined its own business and technical needs

Summary of Business and Technical Requirements

	Mandatory	Mandatory Scored	Non-mandatory Questions
Number of Requirements	32	17	6
Evaluation Criteria	Pass/Fail	Pass/Fail + Points	Points Only
Points	N/A	340	60
Examples	<ul style="list-style-type: none"> • General Terms of Warranty • Quality Assurance Guarantees • Product Technical Advisory Notification Procedures • CAL-Buy System • Invoicing and Payment • Reporting • Catalog Data • Security and Confidentiality • Product Availability • Order Acknowledgement • Other (22 more) 	<ul style="list-style-type: none"> • Customer References • Maintenance Plan • Principal Period of Maintenance • Service Escalation Plan • Installation Services • Data Migration Services • Technical Training • Common Configuration Refresh • Geographic Coverage of Maintenance Services • Ordering Methods • Other (7 more) 	<ul style="list-style-type: none"> • End of Life Management • Desirable Environmental Criteria • Trade In Plan • Term Contract Online information • Continuous Improvement • Custom Reports

- **Bidders:**
 - **Must agree to comply with all mandatory requirements**
 - **Will get points based on the quality of the services proposed**

- **Bidders are not obligated to comply with non-mandatory questions in order to be considered responsive, responsible**

The State is requesting pricing based on a discount-off-list methodology

- **Pricing Structure**

- Discount-off list methodology

- **Pricing Instructions**

- Worksheet 0: Spend Breakdown
- Worksheets 1 through 8: Common Configurations
- Worksheet 9: Off-Spec Pricing
- Worksheet 10: Discounts

Negotiations may be conducted immediately after the determination of responsive and responsible bidders based on eRFP responses

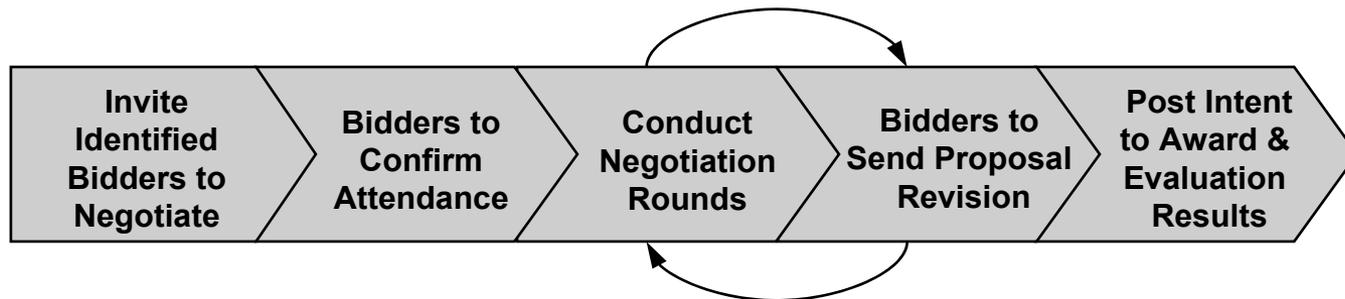
■ Overview of Negotiations

- Negotiation will occur at the State’s discretion only in accordance to Public Contract Code 6611 (a) and Administrative Order 05-01
- The objective of conducting negotiations will be to obtain the best terms from participating bidders

■ Competitive Range

- Minimum of two and a maximum of five bidders by subcategory

■ Negotiation Instructions



The evaluation criteria is comprised of five components of which three have assigned point values to determine a bidder’s total score

Evaluation Criteria per Subcategory

Areas	Components	Evaluation
Administrative Requirements	1) Mandatory Requirements	Pass/Fail – No points
Technical Business Requirements	2) Mandatory Requirements	Pass/Fail – No points
	3) Mandatory Scored Requirements	Pass/Fail – 340 points
	4) Non-mandatory Scored Questions	60 points
Cost Score	5) Pricing Proposals	600 points
Total Points		1,000 points

Key documents required to prepare a final proposal are located on Section 9

- Letter of Acceptance
- Confidentiality Statement
- Federal Debarment
- Payee Data Record
- Non-Collusion Affidavit
- DVBE Program Requirements
- TACPA, EZA and LAMBRA
- Customer Reference Form
- Contract Development
- Standard Agreement
- Statement of Work
- Common Configurations
- Pricing Worksheets
- Glossary

Submission of Questions to eRFP Panel

Submission of Questions to eRFP Panel

Instruction to Submit Question to eRFP Panel

- Please write your questions on the provided cards
- Follow the instructions:
 - Write only one (1) question per card
 - Identify applicable eRFP Section related to the question
 - Check the type (e.g., eTool, evaluation and award) of question
 - Please make sure the question is legible. Illegible questions will not be answered
- Attendants will collect question cards from bidders
- eRFP Panel will provide oral answers to as many questions as possible following the Partnering Workshop at 12:30 pm
- All questions will be answered in writing by March 24, 2005
- Oral responses will not be binding on the State



State of California Department of General Services	IT Hardware Enterprise eRFP # DGS 5008 Bidders' Conference - Question Form
Instructions:	
<ul style="list-style-type: none"> • Write only one (1) question per card • Identify applicable eRFP Section related to the question • Check the type (e.g., eTool, evaluation and award) of question • Please make sure the question is legible. Illegible questions will not be answered. 	
eRFP Section <input style="width: 50px;" type="text"/>	
<div style="border-top: 1px solid black; border-bottom: 1px solid black;"></div>	
Please classify your question by checking one of the following boxes:	
<input type="checkbox"/> California Strategic Sourcing Initiative (CSSI) <input type="checkbox"/> eRFP Process and Logistics <input type="checkbox"/> Key Action Dates <input type="checkbox"/> E-Tool <input type="checkbox"/> SB and/or DVBEs <input type="checkbox"/> Administrative Requirements <input type="checkbox"/> Business and Technical Requirements	<input type="checkbox"/> Pricing <input type="checkbox"/> Evaluation and Award <input type="checkbox"/> Exhibits <input type="checkbox"/> Current Contracts <input type="checkbox"/> Request for Change <input type="checkbox"/> Other: _____

Small Business and DVBE Partnering Workshop

Question and Answer Session with eRFP Panel

Question and Answer Session with eRFP Panel

- California Strategic Sourcing Initiative (CSSI)
- eRFP Process and Logistics
- Key Action Dates
- E-Tool
- Small Business Preference Program
- DVBE Program Requirements
- Administrative Requirements
- Business and Technical Requirements
- Pricing
- Evaluation and Award
- Exhibits
- Current Contracts
- Request for Change

eRFP Fact Sheet

■ Procurement Official

– Dana DeVault-Green

Telephone: (916) 375-5980

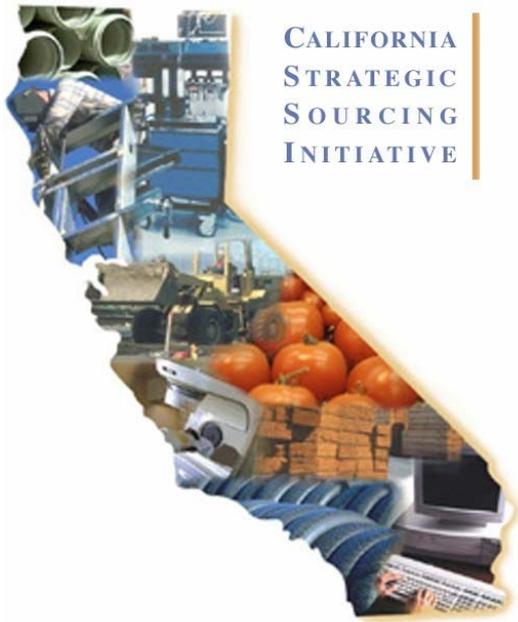
email: ddevault@dgs.ca.gov

■ **CSSI website:** <http://www.pd.dgs.ca.gov/stratsourcing>

■ **eBreviate Help Desk :** 866-254-2745, 24x7

■ **Last Date to Submit Questions about the eRFP:** Monday 21, 2005
(Oral responses will not be binding on the State)

■ **Responses to Bidder Questions will be posted on the CSSI website by Thursday 24, 2005**



IT Hardware Enterprise eRFP # DGS 5008

Bidders Conference

March 18, 2005