



August 10, 2020

# Request for Proposals

## Notice to Prospective Proposers

You are invited to review and respond to this Request for Proposals (RFP), entitled:

### **CTA 20 007 Communications Support Services.**

The deadline for proposals is August 31, 2020. In submitting your proposal, you must comply with these instructions.

All contracts entered into with the California Tahoe Conservancy (Conservancy) will include by reference General Terms and Conditions and Contractor Certification Clauses that may be viewed and downloaded at the [Department of General Service's website](https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Standard-Contract-Language) at <https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Standard-Contract-Language>. If you lack Internet access, contact the Conservancy.

In the opinion of the Conservancy, this Request for Proposals is complete and without need of explanation. However, if you have questions, or should you need any clarifying information, please submit your questions to the email shown below by August 20 2020, including this contract number CTA 20 007.

All questions will be compiled and a full response to all proposers will be provided on [the Conservancy's website](https://tahoe.ca.gov/RFP-communications-support) at <https://tahoe.ca.gov/RFP-communications-support>.

California Tahoe Conservancy  
Procurement/Contracts

530-543-6025 | [procurement@tahoe.ca.gov](mailto:procurement@tahoe.ca.gov)

Please note that no verbal information given will be binding upon the Conservancy unless such information is issued in writing as an official addendum.

Sue Ewbank  
Contract/Procurement Analyst

#### **BOARD MEMBERS**

#### **NATURAL RESOURCES AGENCY**

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*Elizabeth Williamson, Designee*

#### **DEPARTMENT OF FINANCE**

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*Cindy Gustafson, Vice Chair*

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#### **JANE FREEMAN**

*Acting Executive Director*

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## A. Background and Purpose

The California Tahoe Conservancy's (Conservancy) mission is to lead California's efforts to restore and enhance the extraordinary natural and recreational resources of the Lake Tahoe Basin (Basin). The Conservancy's 2018-2023 Strategic Plan identifies its primary program areas and its strategic initiatives. These include:

1. Management of state lands
2. Forest health and wildfire
3. Biodiversity and wildlife
4. Watersheds and water quality
5. Water and firefighting infrastructure (including utilities)
6. Aquatic invasive species
7. Recreation and public access to open space
8. Climate resilience and adaptation
9. Sustainable communities (e.g., infill development, walkable bikeable transit-friendly town centers), and
10. Affordable and workforce housing.

The Conservancy also has a longstanding commitment to the Lake Tahoe Environmental Improvement Program (EIP), which is a capital improvement program designed to implement the Lake Tahoe Regional Plan. EIP program areas cover the same topics as the Conservancy's strategic plan, with the addition of transportation as related to sustainable recreation infrastructure, and air quality.

The Conservancy seeks four communication support services to further its mission and strategic plan, and the EIP. Section B, Scope of Work, provides detail on each service.

## **B. Scope of Work**

The Contractor will perform the following four tasks.

### **1. Market Lake Tahoe License Plates**

The first service is marketing the Lake Tahoe special interest license plates (Tahoe plates). Tahoe license plate funds support natural resource preservation, restoration, and non-motorized trail projects in the Basin. The Conservancy has established relationships and partnerships with the public and private sectors to promote Tahoe plates, including the Tahoe Fund's Plates for Powder Program. The services provided through this agreement will maintain and build upon those relationships to further promote the Conservancy and the sale of Tahoe plates through a multi-year marketing strategy. Work may involve, but is not limited to, the following:

- a. Develop and implement a multi-year strategy, in coordination with the Conservancy, the Tahoe Fund, and other partners, to increase plate sales and generate awareness of the Conservancy.
- b. Develop print media and other marketing material for winter and summer internet and print media advertising, with an emphasis on increasing summer license plate sales.
- c. Develop a social media strategy to support internet sales and promotions, build an online community of supporters, and disseminate information on projects and programs funded through plates sales.
- d. Develop partnerships with the public agencies and private sector in the Basin and with other California Specialty License Plate organizations. These efforts should lead to the development and maintenance of public/private partnerships in promoting sales of Tahoe plates in the Basin and statewide, including the Tahoe Fund's Plates for Powder Program, seasonal promotions, and special promotional opportunities and events with the Tahoe Fund and the private sector.
- e. Monitor, analyze, and report on implementation and effectiveness of outreach activity using license plate sales and renewal data, web traffic, and public relations.
- f. Provide materials for the Conservancy Communication Director to support Department of Motor Vehicles coordination, and to develop new programs and partnerships to promote plate sales and associated projects.

### **Deliverables**

Work activities should result in the following deliverables:

1. Strategic marketing plan in first six months of the contract with detailed roadmaps for summer and winter marketing plans and social media strategy.
2. Documentation of implementation of strategic marketing plan goals and objectives.
3. Marketing media.
4. Written report on plate sales and marketing media performance.

## **2. Identify and Track Legislation, Policy, Budget, and Funding Proposals**

The second service is identifying and tracking proposed legislation, policy, budget, and funding proposals that could affect, whether beneficially or detrimentally, the Conservancy's and/or EIP programs and projects. The primary emphasis of this service would be on State of California information, and secondarily federal information. Note that the Conservancy's forest health work includes the 2.4-million-acre Tahoe-Central Sierra Initiative (TCSI), which extends outside the Basin and covers the Tahoe and Eldorado National Forests. Work may involve, but is not limited to, the following:

- a. Identify and track status of relevant legislative hearings, policy proposals, and state budget activities, from introduction through enactment.
- b. Identify and track relevant state funding programs and guidelines, and grant solicitations.
- c. Identify and track relevant federal funding opportunities.

### **Deliverable**

Work activities should result in the following deliverable:

5. Monthly (at minimum) updates on legislation, policy, budget activities, and funding proposals that could advance or hinder Conservancy and EIP programs and projects, including TCSI. Precise timing and frequency of updates will depend upon the legislative session and may need to be more frequent during this period.

## **3. Design and Produce Custom Communication Materials**

The third service is designing and producing custom outreach, communication, and educational materials that promote Conservancy and EIP programs and projects. This may include videography, graphic design, and the printing of brochures or other material. Audiences and demography vary widely, and may involve Spanish language as well as English language materials. Note again that the Conservancy's forest health work includes the 2.4 million acre TCSI.

## **Deliverable**

Work activities should result in the following deliverable:

6. Custom print and digital materials, printed when needed, as specified through regular, documented communication and requests between the Conservancy and the Contractor.

## **4. Support Special Workshops and Events**

The fourth service is hosting occasional workshops and special events. This may include a statewide, multiple-day meeting of the ten state conservancies, members of the administration and legislature, and conservation leaders. Work may involve, but is not limited to, the following:

- a. Provide logistical support, such as registration, facility, lodging, and catering contracting and management.
- b. Produce and print workshop/event materials.

## **Deliverable**

Work activities should result in the following deliverable:

7. Logistical support and materials for special workshops and/or events, as specified through regular, documented communication and requests between the Conservancy and the Contractor.

### **C. Timeframe**

This is a two-and-a-half-year (30-month) contract. The Conservancy anticipates the contract will begin in October 2020, with a completion date in April 2023. This contract may be amended for up to, but no longer than one additional year.

### **D. Budget**

The budget for this project is up to Two Hundred Seventy Thousand (\$270,000), at a maximum of One Hundred Thirty-Five Thousand Dollars (\$135,000) for the first year and with the second year and a half anticipated to be One Hundred Thirty-Five Thousand Dollars (\$135,000), contingent upon approval in the State Budget Act and authorization by the Conservancy Board. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, the Conservancy shall have the obligation to notify the Contractor in writing of such event and shall have the option to either cancel this Agreement with no liability occurring to the Conservancy beyond payment for services provided up to the date of said written notification or to offer an agreement amendment to Contractor to reflect the reduced amount subject to approval by the Contractor. **This contract will require Department of General Services (DGS) approval.**

Per State of California (State) Contracting Manual Volume 1, 5.81, this contract may be amended, at the Conservancy's discretion, to provide for either additional time up to one year to complete performance OR an additional 30 percent of the original contract value. The contract may not be amended to allow for both additional time and value, and can only be amended for such once.

### **E. Minimum Qualifications for Proposers**

Proposers must have significant experience with marketing, graphic design, advertising, and communications. Proposers must also have a proven track record in tracking and monitoring California state legislation, policy, budget, and funding, and an understanding of how proposals may affect Basin agencies and initiatives. The proposer must also have experience in logistics planning for multi-day events, such as remotely located workshops or multiple-day meetings. The successful proposer will have experience with, or demonstrate ability to learn more about the Conservancy, the Tahoe Fund, and the projects and programs supported by the Lake Tahoe License Plate and the EIP. Key management staff must have promotion experience and be able to build positive relationships with businesses at Lake Tahoe.

### **F. Proposal Requirements and Information**

The following elements are required in all proposals. Any proposal not meeting the minimum requirements will not be considered.

Proposers shall submit all questions to [procurement@tahoe.ca.gov](mailto:procurement@tahoe.ca.gov) no later than 3:00 p.m. on August 20, 2020. Responses to the questions shall be posted to [the Conservancy's website](https://tahoe.ca.gov/RFP-lake-tahoe-license-plate) at <https://tahoe.ca.gov/RFP-lake-tahoe-license-plate> no later than 3:00 p.m. on MONTH, DAY, 2020.

1. Key Action Dates

- RFP available to prospective proposers August 10, 2020
- Question submittal deadline August 20, 2020
- Responses to questions posted August 24, 2020
- Final Date for Proposal Submission August 31, 2020
- Notice of Intent to Award Depends on potential post-bid interviews.
- Award Date Five days after Notice of Intent to Award

The contract start date will be the date the contract is signed by all parties and approved by DGS.

2. Submission of Proposal

- a. All proposals and all required documents must be submitted by email to [procurement@tahoe.ca.gov](mailto:procurement@tahoe.ca.gov), with the subject line "CTA 20 007 [*Name of Proposer*]," no later than the date and time shown in the Key Action Dates above. Proposals received after this date (email time stamp validation) will not be considered.
- b. All bids shall include the documents identified in Section F, Required Attachment Checklist. Bids not including the proper "required attachments" shall be deemed non-responsive. A non-responsive proposal is one that does not meet the basic proposal requirements.
- c. All documents requiring a signature must bear an original signature of a person authorized to bind the bidding firm.
- d. Proposals must be submitted for the performance of all the work described in the above Scope of Work. Any deviation from the work specifications will not be considered and will cause a proposal to be rejected.
- e. A proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. The Conservancy may reject any or all bids and may waive an immaterial deviation in a bid. The State's waiver of an immaterial deviation shall in no way modify the RFP document or excuse the proposer from full compliance with all requirements if awarded the contract.



- f. Costs incurred for developing bids and in anticipation of award of the contract are entirely the responsibility of the proposer and shall not be charged to the State of California.
  - g. An individual who is authorized to bind the proposer contractually shall sign the Proposal/Proposer Certification Sheet. The signature should indicate the title or position that the individual holds in the firm. An unsigned proposal may be rejected.
  - h. A proposer may modify a proposal after its submission by withdrawing its original proposal and resubmitting a new proposal prior to the proposal submission deadline. Proposer modifications offered in any other manner, oral or written, will not be considered.
  - i. A proposer may withdraw its proposal by submitting a written withdrawal request to the Conservancy, signed by the proposer or an authorized agent. A proposer may thereafter submit a new proposal prior to the proposal submission deadline. Proposals may not be withdrawn without cause after proposal submission deadline.
  - j. The Conservancy may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum to all parties who received a proposal package.
  - k. The Conservancy reserves the right to reject all proposals. The Conservancy is not required to award a contract.
  - l. Before submitting a response to this solicitation, proposers should review, correct all errors and confirm compliance with the RFP requirements.
  - m. The Conservancy does not accept alternate contract language from a prospective contractor. A proposal with such language will be considered a counter proposal and will be rejected. The State's General Terms and Conditions (GTC) are not negotiable.
  - n. No oral understanding or agreement shall be binding on either party.
3. Evaluation and Selection
- a. Each proposal will be checked for the presence or absence of required information in conformance with the submission requirements of this RFP.
  - b. Proposals that contain false or misleading statements, or which provide references, which do not support an attribute or condition claimed by the proposer, may be rejected.
  - c. Award, if made, will be to the highest scored responsible proposal.

#### 4. Evaluation Criteria

Proposals will be evaluated based on the adequacy of the response to all the requirements of this RFP and must include all information specifically required in all sections of the RFP. Proposal format and minimum qualifications will be evaluated on a

points basis, with the award made to the highest scoring proposal. RFPs will be evaluated using the following criteria and ratings:

- a. Statement of qualifications of proposed staff demonstrates expertise in the following: **(0-30 points)**
  - i. marketing strategy, advertising, graphic design, and communications (0-20 points)
  - ii. tracking legislation, policy, budget, and funding opportunities (0-7 points)
  - iii. logistics planning for large multi-day events (0-3 points)
- b. Thoroughness and quality of proposal narrative, proposed work plan, and budget, including quality and quantity of proposed marketing opportunities **(0-40 points)**
- c. Cost of proposed budget **(0-30 points)**

The lowest cost proposal is awarded the maximum cost points. Other proposals are awarded cost points based on the following calculation:

cost points for other proposer = lowest proposer's cost / other proposer's cost (factor) x maximum cost points available.

Example: lowest cost proposal = \$75,000, other proposal = \$100,000, 30 cost points available:

$(\$75,000/\$100,000)=(\frac{3}{4}) \times 30 = 22.5$  cost points awarded to the other proposal

## 5. Evaluation Standards

Proposals will be evaluated using the consensus process. A committee will evaluate each proposal and collectively agree on a score for each proposal using the Evaluation Criteria Score Sheet.

The committee may conduct phone interviews with the top scored proposals. Prior to the interview, the State may contact each proposer to obtain additional information. The interview will provide the proposer the opportunity to elaborate on the written material previously submitted and give the State the opportunity to meet their key personnel and ask questions regarding any aspect of the proposal, background and other relevant topics.

## Evaluation Criteria Score Sheet

Name of Proposer:

Evaluator:

<b>Proposal Evaluation</b>	<b>Maximum Possible Score</b>	<b>Score</b>
a(i). How well does the statement of qualifications demonstrate the proposer's expertise in marketing, advertising, graphic design, and communications	20 pts	
a(ii). How well does the statement of qualifications demonstrate the proposer's expertise tracking legislation, policy, budget, and funding opportunities	7 pts	
a(iii). How well does the statement of qualifications demonstrate the proposer's expertise logistics planning for large multi-day events?	3 pts	
b. What is the the thoroughness and quality of narrative, proposed work plan, and budget, including quality and quantity of proposed marketing opportunities.	40 pts	
c. Cost points up to 30. (See calculation above in Section 4c	30 pts	
<b>Total</b>	<b>100 pts</b>	
<b>Small Business Preference Points*</b> * If the highest scored proposal is from a non-certified small business or microbusiness, then five percent of the highest responsible bidder's total score is given to each certified small business bidder.	<b>Five percent of highest responsible proposal's total score</b>	
<b>GRAND TOTAL</b>	<b>105 PTS (maximum, with small business preference)</b>	

### 6. Award and Protest

- a. Notice of the proposed award shall be posted in a public place in the office of the California Tahoe Conservancy for five (5) working days prior to awarding the agreement.

- b. If any proposer, prior to the award of agreement, files a protest with the California Tahoe Conservancy and the Department of General Services, Office of Legal Services, 707 Third Street, 7th Floor, Suite 7-330, West Sacramento, CA 95605, on the grounds that the (protesting) proposer would have been awarded the contract had the agency correctly applied the evaluation standard in the RFP, or if the agency followed the evaluation and scoring methods in the RFP, the agreement shall not be awarded until either the protest has been withdrawn or the Department of General Services has decided the matter. It is suggested that you submit any protest by certified or registered mail.
- c. Within five (5) calendar days after filing the initial protest, the protesting proposer shall file with the Department of General Services, Office of Legal Services and the California Tahoe Conservancy a detailed statement specifying the grounds for the protest.
- d. Upon resolution of the protest and award of the agreement, Contractor must complete and submit to the awarding agency the Payee Data Record (STD 204), to determine if the Contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on [the DGS website](https://www.dgsapps.dgs.ca.gov/osp/StatewideFormsWeb/Forms.aspx) at <https://www.dgsapps.dgs.ca.gov/osp/StatewideFormsWeb/Forms.aspx> under the heading STD Forms. No payment shall be made unless a completed STD 204 has been returned to the awarding agency.
- e. Upon resolution of the protest and award of the agreement, Contractor must sign and submit to the awarding agency, page one (1) of the Contractor Certification Clauses, which can be found on [the DGS website](https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Standard-Contract-Language) at <https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Standard-Contract-Language>.

## 7. Disposition of Proposals

- a. All documents submitted in response to this RFP will become the property of the State of California, and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public.
- b. Proposal packages may be returned only at the proposer's expense, unless such expense is waived by the awarding agency.

## 8. Agreement Execution and Performance

- a. Performance shall start not later than the express date set by the awarding agency and the Contractor, after all approvals have been obtained and the contract is fully

executed. Should the Contractor fail to commence work at the agreed upon time, the awarding agency, upon five (5) days written notice to the Contractor, reserves the right to terminate the contract. In addition, the Contractor shall be liable to the State for the difference between the Contractor's bid price and the actual cost of performing work by the second lowest proposer or by another contractor.

- b. All performance under the contract shall be completed on or before the termination date of the contract.

## **G. Preference Programs**

### **1. Small Business Preference**

California law encourages state departments to first consider a Small Business Enterprise (Small)/ Microbusiness Enterprise (Micro) for contracting opportunities. The Conservancy is committed to supporting Small/Micro business participation in state contracting and seeks to use certified Small/Micro businesses whenever possible.

A Small/Micro business enterprise is defined as a business certified by the DGS Office of Small Business and Disabled Veteran Business Enterprise Certification Services (OSDS) in which:

- a. The principal office is located in California
- b. The officers are domiciled in California
- c. The business is independently owned and operated
- d. The business, with any affiliates, is not dominant in its field of operation; and
- e. For Small Business, either:
  - i. The business, together with any affiliates, has 100 or fewer employees and averaged annual gross receipts of \$15,000,000 or less over the previous three years, or
  - ii. The business is a manufacturer with 100 or fewer employees

A small business will automatically be designated as a microbusiness if annual gross receipts are less than \$3,500,000; or the small business is a manufacturer with 25 or fewer employees.

Section 14835, et seq., of the California Government Code requires that a five percent preference be given to proposers who qualify as a Small/Micro business enterprise. The rules and regulations of this law are contained in Title 2, California Code of Regulations, section 1896, et seq. A copy of the regulation is available upon request.

To claim the Small/Micro business preference, your firm must have a completed application (including proof of annual receipts) on file with the DGS, OSDS, by 5:00 p.m.

on the date bids are due, and receipt verified by such office. Therefore, if you are a Small/Micro business, but are not certified, it is to your advantage to become certified. For certification and preference approval process information, contact the Conservancy Small Business Coordinator at 530-543-6025.

2. Disabled Veterans Business Enterprise Program (DVBE) Participation. Responses to this RFP must meet the requirements of the State DVBE Program. Learn more about the DVBE program requirements at [the DGS website](https://www.dgs.ca.gov/OBAS/Resources/Page-Content/OBAS-Resources-List-Folder/DGS-SB-DVBE-First-Policy) at <https://www.dgs.ca.gov/OBAS/Resources/Page-Content/OBAS-Resources-List-Folder/DGS-SB-DVBE-First-Policy> and also [at the DGS website](https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/How-to-do-business-with-the-state-of-California) at <https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/How-to-do-business-with-the-state-of-California>.

## H. Required Attachments

Refer to the following pages for additional Required Attachments that are a part of this Request for Proposal.

### Attachment 1

Proposer Name \_\_\_\_\_

#### Required Attachment Check List

A complete proposal or proposal package will consist of the items identified below.

Complete this checklist to confirm the items in your bid. Place a check mark or "X" next to each item that you are submitting to the State. **FOR YOUR BID TO BE RESPONSIVE, ALL REQUIRED ATTACHMENTS MUST BE RETURNED.** This checklist must be returned with your proposal package.

<u>Attachment</u>	<u>Attachment Name/Description</u>
___ Attachment 1	Required Attachment Check List
___ Attachment 2	Proposal/Proposer Certification Sheet
___ Attachment 3	Sample Cost Proposal Worksheet
___ Attachment 4	Proposer References
___ Attachment 5	DVBE Program Requirements and DVBE Incentive Waiver
___ Attachment 6	List of Proposed Subcontractors
___ Attachment 6a	DVBE Subcontractor Incentive Request
___ Attachment 6b	DVBE Subcontractor/Supplier Acknowledgement
___ Attachment 7	Darfur Contracting Act Certification
___ Attachment 8	STD 204 Payee Data Record

## Attachment 2

### Proposal/Proposer Certification Sheet

This Proposal/Proposer Certification Sheet must be signed and returned along with all the "required attachments" as an entire package by email.

**Do not return the Request for Proposals or the Standard Agreement (STD 213) at the end of this RFP.**

**Our all-inclusive bid is shown on the Cost Proposal Worksheet Attached (Attachment 3).**

All required attachments are included with this certification sheet.

- A. I have read and understand the DVBE participation requirements and have included documentation demonstrating that I have met the participation goals or have made a good faith effort.
- B. The signature affixed hereon and dated certifies compliance with all the requirements of this bid document. The signature below authorizes the verification of this certification.
- C. The undersigned Contractor hereby proposes to carry out the work at the bid price and in accordance with the terms and conditions set forth in this Request for Proposals, and the attached Standard 213, including all plans specifications.

#### **An Unsigned Proposal/Proposer Certification Sheet May Be Cause for Rejection**

1. Company Name	2. Telephone Number	2a. Fax Number
3. Address		
Indicate your organization type:		
4. <input type="checkbox"/> Sole Proprietorship	5. <input type="checkbox"/> Partnership	6. <input type="checkbox"/> Corporation
Indicate the applicable employee and/or corporation number:		
7. Federal Employee ID No. (FEIN)	8. California Corporation No.	
9. Indicate applicable license and/or certification information:		
10. Bidder's Name (Print)	11. Title	
12. <b>Signature</b>	13. Date	
14. Are you certified with the Department of General Services, Office of Small Business Certification and Resources (OSBCR) as:		
b. California Small Business Yes <input type="checkbox"/> No <input type="checkbox"/>  If yes, enter certification number:  _____	b. Disabled Veteran Business Enterprise Yes <input type="checkbox"/> No <input type="checkbox"/>  If yes, enter your service code below:  _____	
<b>NOTE:</b> A copy of your Certification is required to be included if either of the above items is checked "Yes". Date application was submitted to OSBCR, if an application is pending:		



## Completion Instructions for Proposal/Proposer Certification Sheet

Complete the numbered items on the  
Proposal/Proposer Certification Sheet by following the instructions below.

**Item Numbers 1, 2, 2a, 3:** Must be completed. These items are self-explanatory.

**Item Number 4:** Check if your firm is a sole proprietorship. A sole proprietorship is a form of business in which one person owns all the assets of the business in contrast to a partnership and corporation. The sole proprietor is solely liable for all the debts of the business.

**Item Number 5:** Check if your firm is a partnership. A partnership is a voluntary agreement between two or more competent persons to place their money, effects, labor, and skill, or some or all of them in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. An association of two or more persons to carry on, as co-owners, a business for profit.

**Item Number 6:** Check if your firm is a corporation. A corporation is an artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instances, of a single person and his successors, being the incumbents of a particular office, but ordinarily consisting of an association of numerous individuals.

**Item Number 7:** Enter your federal employee tax identification number.

**Item Number 8:** Enter your corporation number assigned by the California Secretary of State's Office. This information is used for checking if a corporation is in good standing and qualified to conduct business in California.

**Item Number 9:** Complete, if applicable, by indicating the type of license and/or certification that your firm possesses and that is required for the type of services being procured.

**Item Numbers 10, 11, 12, 13:** Must be completed. These items are self-explanatory.

**Item Number 14:** If certified as a California Small Business, place a check in the "Yes" box, and enter your certification number on the line. If certified as a Disabled Veterans Business Enterprise, place a check in the "Yes" box and enter your service code on the line. If you are not certified to one or both, place a check in the "No" box. If your certification is pending, enter the date your application was submitted to OSBCR.

### Attachment 3

#### Sample Cost Proposal Worksheet

**DIRECT LABOR**

<b>List Position Titles and Names</b>	<b>HOURS</b>	<b>RATE</b>	<b>TOTAL</b>
Program Manager	@	\$	\$
Account Personnel	@	\$	\$
Media Buyer	@	\$	\$
Other	@	\$	\$
<b>TOTAL SUBCONTRACT EXPENSES</b>	_____	_____	_____

**(Itemize Type of Subcontracting Work and Total Cost. Attach Separate Cost Proposal for Each Subcontractor.)**

<b>OTHER DIRECT COSTS (Except Labor)</b>	<b>Percent of Direct Costs</b>	<b>Total</b>
Travel*	%	\$
Supplies	%	\$
Other Direct Costs (Except Labor)	%	\$
Itemize any expenses over \$500 on a separate attachment		
<b>SUBTOTAL (OTHER DIRECT COSTS)</b>		<b>\$</b>
<b>PROFIT</b>	% of Total Contract	<b>\$</b>
<b>PROJECT TOTAL</b>		<b>\$</b>

**TASK/ACTIVITY**

<b>(As Outlined in Exhibit A-1)</b>	<b>LABOR</b>	<b>AMOUNT</b>
Task 1	_____	\$
Task 2	_____	\$
Task 3	_____	\$
<b>Project Total</b>		<b>\$</b>

\* Please include detailed breakdowns of the sub-tasks and associated costs under each category.

**Attachment 4**  
**Proposer References**

List below three references for services performed within the last five years, which are similar to the scope of work to be performed in this contract.

**REFERENCE 1**

Name of Firm:

Street Address: City: State: Zip:

Contact Person: Telephone Number:

Dates of Service: Value or Cost of Service:

Brief Description of Service Provided:

**REFERENCE 2**

Name of Firm:

Street Address: City: State: Zip:

Contact Person: Telephone Number:

Dates of Service: Value or Cost of Service:

Brief Description of Service Provided:

**REFERENCE 3**

Name of Firm:

Street Address: City: State: Zip:

Contact Person: Telephone Number:

Dates of Service: Value or Cost of Service:

Brief Description of Service Provided:

## **Attachment 5**

### **DVBE Program Requirements and DVBE Incentive Waiver**

**CTA 20 007**

### **Communications Support Services**

Download attachment 5, the DVBE Program Requirements and DVBE Incentive Waiver, from [the DGS website](https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd07-04.pdf) at <https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd07-04.pdf>.

**Attachment 6**

**List of Proposed Subcontractors**

**CTA 20 007  
Communications Support Services**

Listed hereinafter is the name and address of each subcontractor who will be employed, and the kind of work which each will perform if the contract is awarded. I understand that under Government Code Section 4100 through 4108, I must clearly set forth the name and address of each subcontractor who will perform work or labor or render service to me, in an amount in excess of one-half of one percent (1/2 of 1 percent) of my total bid, and that as to any work in which I fail to do so, I agree to perform that portion myself or be subject to penalty under the act.

(Note: In case more than one subcontractor is named for the same kind of work, state the portion that each will perform. Vendors or suppliers of materials only need not be listed.)

If further space is required for the list of proposed subcontractors, additional sheets showing the required information, as indicated below, shall be attached hereto and made a part of the Bid Form.

If no subcontractors are to be used, write "**NONE**".

**KIND OF WORK SUBCONTRACTOR NAME AND ADDRESS**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

## Attachment 6a

### DVBE Subcontractor Incentive Request

List each certified DVBE that will be subcontracted with. To be granted a bidding incentive, total DVBE subcontractor use must equal at least 1 percent up to a total of 5 percent, unless other specifications are included elsewhere in the agreement, of the total price or cost offered. Each named subcontractor must be actively certified as a DVBE by the bid submission due date and must acknowledge their participation as claimed herein via a DVBE Subcontractor/Supplier Acknowledgement (Attachment 6b). **Attach to this form an acknowledgement (Attachment 6b) signed by an authorized representative of each named subcontractor acknowledging their proposed use as described herein.**

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#### Name of certified DVBE Subcontractor

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Name of Subcontractor  
Street address | City | State | Zip Code  
Contact Person | Telephone number

( )  
DVBE Certification No. | Certification exp. date | Participation dollar value | Committed % of total bid  
\$ | %

Brief description of the commercially useful function(s) to be performed and/or provided:

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#### Name of certified DVBE Subcontractor

---

Name of Subcontractor  
Street address | City | State | Zip Code  
Contact Person | Telephone number

( )  
DVBE Certification No. | Certification exp. date | Participation dollar value | Committed % of total bid  
\$ | %

Brief description of the commercially useful function(s) to be performed and/or provided:

---

---

#### Name of certified DVBE Subcontractor

---

Name of Subcontractor  
Street address | City | State | Zip Code  
Contact Person | Telephone number

( )  
DVBE Certification No. | Certification exp. date | Participation dollar value | Committed % of total bid  
\$ | %

Brief description of the commercially useful function(s) to be performed and/or provided:

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## DVBE Subcontractor/Supplier Acknowledgement

Name of Bidding Firm / Prime Contractor	CTC IFB or RFP Number:
Total Dollar Value of Subcontractor Use	

This document confirms and acknowledges that the firm named below agreed to be identified by a bidding firm as a proposed DVBE subcontractor or supplier for a CDPH procurement.

Subcontractor acknowledgements:

- A. The subcontracting firm named herein has committed to perform or provide services/labor or supplies equal to a percentage of the total bid/cost proposal price submitted by the bidding firm named above.
- B. The subcontracting firm named herein acknowledges the total dollar value of claimed participation identified above.
- C. The subcontracting firm named herein agrees to provide the following subcontracted services/labor or supplies under the resulting contract if the bidding firm named above receives the contract award:

Below and/or continued on an attachment is a brief description of the commercially useful function(s) that the subcontractor/supplier identified herein will provide or supply:

The subcontracting firm named herein understands it is its sole responsibility to contact the bidding firm named above to learn if the Proposer was awarded the contract pursuant to the referenced bid number and to confirm its subcontract agreement. If the bidding firm named above receives an award based in part on the DVBE subcontractor incentive, the bidding firm/contractor is obligated to use each DVBE subcontractor or supplier identified in its proposal unless a subcontractor substitution is requested after contract execution pursuant to Public Contract Code Section 4107 and Title 2 California Code of Regulations Section 1896.10 and Section 999.5(a) of the Military and Veterans Code.

The person signing below certifies the information supplied on this form is true and accurate to the best of its knowledge and agrees to allow the State to confirm this information, if deemed necessary.

Name of Proposed Subcontractor/Supplier		Date Signed
Signature of Subcontractor/Supplier Representative	Telephone number ( )	Email address (if applicable)
	Printed/Typed Name	
	Title	

## Attachment 7

### Darfur Contracting Act Certification

Public Contract Code Sections 10475 -10481 applies to any company that currently or within the previous three years has had business activities or other operations outside of the United States. For such a company to bid on or submit a proposal for a State of California contract, the company must certify that it is either a) not a scrutinized company; or b) a scrutinized company that has been granted permission by the Department of General Services to submit a proposal.

If your company has not, within the previous three years, had any business activities or other operations outside of the United States, you do **not** need to complete this form.

#### **OPTION #1 - CERTIFICATION**

If your company, within the previous three years, has had business activities or other operations outside of the United States, in order to be eligible to submit a bid or proposal, please insert your company name and Federal ID Number and complete the certification below.

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that a) the prospective proposer/bidder named below is **not** a scrutinized company per Public Contract Code 10476; and b) I am duly authorized to legally bind the prospective proposer/bidder named below. This certification is made under the laws of the State of California.

Company/Vendor Name (Printed): \_\_\_\_\_

Federal ID Number: \_\_\_\_\_

By (Authorized Signature): \_\_\_\_\_

Printed Name and Title of Person Signing: \_\_\_\_\_

Date Executed: \_\_\_\_\_ Executed in the County and State of: \_\_\_\_\_

#### **OPTION #2 – WRITTEN PERMISSION FROM DGS**

Pursuant to Public Contract Code section 10477(b), the Director of the Department of General Services may permit a scrutinized company, on a case-by-case basis, to bid on or submit a proposal for a contract with a state agency for goods or services, if it is in the best interests of the state. If you are a scrutinized company that has obtained written permission from the DGS to submit a bid or proposal, complete the information below.

We are a scrutinized company as defined in Public Contract Code section 10476, but we have received written permission from the Department of General Services to submit a bid or proposal pursuant to Public Contract Code section 10477(b). A copy of the written permission from DGS is included with our bid or proposal.

Company/Vendor Name (Printed): \_\_\_\_\_

Federal ID Number: \_\_\_\_\_

*Initials of Submitter:* \_\_\_\_\_

*Printed Name and Title of Person Initialing:* \_\_\_\_\_



## **Attachment 8**

### **STD 204 Payee Data Record**

#### **Communications Support Services**

Download attachment 8, the STD 204 Payee Data Record, from [the DGS website](https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf) at <https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf>.