

Solicitation RFQ FTB 1011-599

Software Maintenance

State of California

Bid RFQ FTB 1011-599 Software Maintenance

Bid Number **RFQ FTB 1011-599**
Bid Title **Software Maintenance**

Bid Start Date **Mar 18, 2011 3:59:06 PM PDT**
Bid End Date **Apr 6, 2011 1:00:00 PM PDT**
Question & Answer
End Date **Mar 29, 2011 1:00:00 PM PDT**

Bid Contact **Linda A Turner**
Staff ISA
916-845-4715
linda.turner@ftb.ca.gov

Standard Disclaimer **The State of California advises that prospective bidders periodically check the websites, including but not limited to Bidsync, and/or other state department links for modifications to bid documents. The State of California is not responsible for a prospective bidder's misunderstanding of the bid solicitation or nonresponsive bid due to failure to check these websites for updates or amendments to bid documents, and/or other information regarding the bid solicitations. Failure to periodically check these websites will be at the bidder's sole risk.**

The information published and/or responded to on these websites is public information. Confidential questions/issues/concerns should be directed to the contact on the ad.

Description

Genesys Software Maintenance - 3 year term

STATE OF CALIFORNIA
Franchise Tax Board
REQUEST FOR QUOTATION – INFORMATION TECHNOLOGY

QUOTATION/BID DUE DATE: April 6, 2011	Responses must be delivered to the California Franchise Tax Board (FTB) no later than 1:00 pm	Delivery Date:
Bidder name and address (Print): 4 _____ 4 _____ Contact (Print): 4 _____ Phone: _____ Fax: _____ 4 _____ Email: 4 _____	SOLICITATION NO. RFQ FTB 1011-599	RELEASE DATE March 18, 2011
Name (Print): 4 _____ Title: 4 _____ Signature: 4 _____ Date: _____ California Corporation Number: 4 _____ * If Bidder does not possess a California Corporation Number, indicate "None" or "N/A".	For further information contact: Linda Turner (916) 845-4715 Linda.Turner@ftb.ca.gov Return final quotation/bid to: Franchise Tax Board HAND DELIVERY* or UPS/FEDEX/DHL: Procurement and Asset Management Attn: Linda Turner Mail Stop MS A374 9646 Butterfield Way Sacramento, CA 95827 <i>*Please make arrangements with the contact listed above to schedule a specified time for hand delivered final quotations/bids.</i> OR FACSIMILE (FAX) / EMAIL: (916) 843-0680 Please note the following two items: 1) The State reserves the right to consider authorized fax/email quotations/bids as properly "sealed" if received prior to the closing time specified, provided that a hand-written signature is shown on the fax/email. (System generated signatures are not acceptable forms of signatures.) 2) If fax/email transmission of the quotation/bid is acceptable and the Bidder chooses to transmit their quotation/bid via fax/email, the Bidder understands and agrees that the State will consider only those portions of the quotation/bid received prior to the closing time specified; any pages received after that time, regardless of when sent, will not be considered. The State shall not be responsible for any delays in fax/email quotations/bids due to technical problems on either the Bidder or State's equipment (e.g. busy fax machine, etc.).	ARE YOU CLAIMING PREFERENCE AS A SMALL BUSINESS: YES _____ NO _____ IF YES, MANUFACTURER? YES _____ NO _____ ARE YOU A NON-SMALL BUSINESS CLAIMING AT LEAST 25% SMALL BUSINESS SUBCONTRACTOR PREFERENCE? YES _____ NO _____ Ship To: Franchise Tax Board California Warehouse 9646 Butterfield Way Sacramento, CA 95827 Key Action Dates: 1. Release of Request For Quotations (RFQ) March 18, 2011 2. Last Day to Submit Questions for Clarification of the RFQ March 29, 2011 by 1:00pm PT 3. Final Contractor Quotation/Bid Due at FTB April 6, 2011 by 1:00pm PT 4. Selection Evaluation Review* April 11, 2011 5. Intent to Award* April 12, 2011 6. Contract Award* April 19, 2011 *These dates are subject to change without notice or addendum to this RFQ.
Bidder offers and agrees if this response is accepted within 45 calendar days following the date the response is due to furnish all the items upon which prices are quoted, at the prices set opposite each item, delivered at the designated point(s) by the method of delivery and within the times specified and subject to the attached General Provisions. DELCARATIONS UNDER PENALTY OF PERJURY: By signing above, with inclusion of the date of signature, the above signed Bidder DECLARES UNDER PENALTY OF PERJURY under the laws of the State of California as follows: (1) (STATEMENT OF COMPLIANCE). The above signed has complied with the non-discrimination program requirements of Government Code 12990 and Title 2, California Administrative Code Section 8103, and such declaration is true and correct. (2) The National Labor Relations Board declaration set forth in Paragraph 48 of the General Provisions is true and correct. (3) If a claim is made for the Small Business or Disabled Veterans Business preference, the information set forth within is true and correct. Your signature affixed hereon and dated certifies that you have met all California required tax filings and have no outstanding tax obligations. Your signature authorizes the verification of this certification. Your signature affixed hereon certifies that you have met all requirements, specifications, and certifications of this quotation/bid solicitation.		

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REQUEST FOR QUOTATION CONTINUATION	Supplier Name:	Solicitation No. RFQ FTB 1011-599	Rev.
Delivery – Final delivery, inspection and acceptance shall be at the location described in the “Ship To” address on page 1. Quotation Award: For the purposes of this solicitation, contract award will be made on the basis of “All or None”. This bid will be awarded based on low cost. Cash Discounts: Cash discounts will not be considered when evaluating bid responses for award purposes. However, cash discounts may be offered and taken by departments processing invoices within the timeframe specified. Shipment: For the purposes of this solicitation, only bid responses quoting F.O.B Destination will be accepted. Inquiries/questions: Written questions must be entered in to BidSync by (March 29, 2011, 1:00pm PT) Bidder's Instructions and General Provisions: The attached Bidder's Instructions and General Provisions have recently been revised. Please read carefully. Quotation attachments: Bid responses that reference a supplier's own terms and conditions or provisions will be considered non-responsive and will be rejected. Important Note: Only bids quoted on the State's own quotation forms will be considered. Bids shall be submitted in a sealed envelope/package, faxed or emailed with the solicitation number and the bid due date and time clearly marked on the outside of the envelope/package.			
Responsible Bidder: The Franchise Tax Board may require bidder(s) to submit evidence of their qualifications at such times and under conditions, as it may deem necessary. The question of whether a particular bidder is a responsible bidder may involve an evaluation of the bidder's experience, type of facility, expertise or financial resources regarding the particular items requested by the pertinent solicitation. If a bidder has been determined to be non-responsible, the bid shall be rejected.			
Facsimile (FAX) Bids: Facsimile machine (fax) bids will be considered only if they are sent to (916) 843-0680. Bids sent to any other fax number will not be considered. To be considered, all pages of a faxed bid must be completely received prior to the bid due date and time specified in this solicitation. Please be advised that there is a heavy demand placed on the fax machine receiving bids, and the State assumes no responsibility if a bidder cannot transmit their bid via fax, or if the entire bid is not received prior to the bid due date and time.			
Payee Data Record: The successful bidder will be required to submit a Payee Data Record, STD. Form 204 listing their Taxpayer Identification Number. Acceptable verification results are required prior to contract award.			
Seller's Permit: If applicable, please note that award will be conditional on providing the following document prior to award: You must provide your company's California retailer's seller's permit or certification of registration and, if applicable, the permit or certification of all participating affiliates, issued by California's State Board of Equalization (BOE), pursuant to all requirements as set forth in Sections 6487, 7101 and sections 6452.1, 6487.3, 18510 of the Revenue and Taxation Code, and Section 10295.1 of the Public Contract code. In order to expedite the process of verifying the validity of the permit, provide the BOE permit number in the space provided below (or attach a copy of the permit with your bid.) Retailer's Seller's Permit Number: _____			

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• Award of Contract Award of contract, if made, will be in accordance with the RFQ information on Evaluation to a responsible bidder whose bid complies with all the requirements of the RFQ documents and an addenda thereto, except for such immaterial defects as may be waived by the State. Award, if made, will be made within forty-five (45) days after the scheduled date for Contract Award as specified in the RFQ; however, a bidder may extend the offer beyond 45 days in the event of a delay of contract award. The State reserves the right to determine the successful bidder(s) either on the basis of individual items or on the basis of all items included in its RFQ, unless otherwise expressly provided in the State's RFQ. Unless the bidder specifies otherwise in its bid, the State may accept any item or group of items of any bid. The State reserves the right to modify or cancel in whole or in part its RFQ. Written notification of the State's intent to award will be made to all bidders. If a bidder, having submitted a bid, can show that its bid, instead of the bid selected by the State, should be selected for contract award, the bidder will be allowed five (5) working days to submit a Notice of Intent to Protest, according to the instructions contained in the paragraph titled "Protests" of this RFQ. • Protests Any bidder's issues regarding solicitation requirements must be resolved (or attempts to resolve them must have been made) before a protest may be submitted according to the procedure below. These issues will first be resolved by the contact for the solicitation or if they result in a protest, the protest will be submitted to DGS Procurement Division Deputy Director to hear and resolve issues and whose decision will be final. If a bidder has submitted a bid which it believes to be responsive to the requirements of the RFQ and to be the bid that should have been selected according to the evaluation procedures in the solicitation and the bidder believes the State has incorrectly selected another bidder for award, the bidder may submit a protest of the selection as described below. Protests regarding selection of the "successful vendor" will be heard and resolved by the Victim Compensation and Government Claims Board whose decision will be final. All protests of award must be made in writing, signed by an individual authorized to bind the bidder contractually and financially, and contain a statement of the reason(s) for protest; citing the law, rule, regulation or procedure on which the protest is based. The protester must provide facts and evidence to support the claim. Protests must be mailed or delivered to: Street and Mailing Address: Deputy Director Procurement Division 707 Third Street, Second Floor South West Sacramento, CA 95605 Facsimile No.: (916) 375-4611 All protests to the RFQ or protests concerning the evaluation, recommendation, or other aspects of the selection process must be received by the DGS Procurement Division Deputy Director as promptly as possible, but not later than the date indicated in the Notification of Intent to Award. Certified or registered mail must be used unless delivered in person, in which case the protester should obtain a receipt of delivery.			

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California Disabled Veteran Business Enterprise (DVBE) Program Requirements: The State has established goals for Disabled Veteran Business Enterprises (DVBE) participating in State contracts. Please review the attached DVBE program requirements package. Bidders must complete and return all the appropriate pages in order for the bid to be considered responsive. “For Purposes of this solicitation, the DVBE program requirements are waived and there is no DVBE Incentive.” The CA DVBE Participation Requirements packet can be found at: http://www.documents.dgs.ca.gov/pd/poliproc/DVBEPROGREQ103107.doc.			
Small Business Regulations: The Small Business regulations, located in the California Code of Regulations (Title 2, Division 2, Chapter 3, Subchapter 8, Section 1896 et. seq.), concerning the application and calculation of the small business preference, small business certification, responsibilities of small business, department certification, and appeals are revised, effective 09/09/04. The new regulations can be viewed at (www.pd.dgs.ca.gov/smbus). Access the regulations by Clicking on “Small Business Regulations” in the right sidebar. For those without Internet access, a copy of the regulations can be obtained by calling the Office of Small Business and DVBE Services at (916) 375-4940.			
Non-Small Business Subcontractor Preference: A 5% bid preference is now available to a non-small business claiming 25% California certified small business subcontractor participation. If applicable, claim the preference in the box on the right hand side of the first page of this solicitation.			
Small Business Nonprofit Veteran Service Agencies (SB/NVSA): SB/NVSA prime bidders meeting requirements specified in the Military and Veterans Code Section 999.50 et seq. and obtaining a California certification as a small business are eligible for the 5% small business preference. If applicable, claim the preference in the box on the right hand side of the first page of this solicitation.			
Attachment with bid required if claiming the Small Business Preference: All bidders must complete and include the Bidder Declaration form GSPD-05-105. If claiming the non-small business subcontractor preference, the form must list all of the California certified small businesses with which you commit to subcontract in an amount of at least twenty-five percent (25%) of the net bid price. All certified small businesses must perform a “commercially useful function” (CUF) in the performance of the contract as defined in Government Code Section 14837(d)(4).			
Small Business Certification: Bidders claiming the small business preference must be certified by California as a small business or must commit to subcontract at least 25% of the net bid price with one or more California certified small businesses. Completed certification applications and required support documents must be submitted to the Office of Small Business and DVBE Services (OSDS) no later than 5:00 p.m. on the bid due date, and the OSDS must be able to approve the application as submitted. Small business nonprofit veteran service agencies (SB/NVSA) claiming the small business preference must possess certification by California prior to the day and time bids are due. Questions regarding certification should be directed to the OSDS at (916) 375-4940.			
Declaration Forms: All bidders must complete the Bidder Declaration GSPD-05-105 and include it with the bid response. When completing the declaration, bidders must identify all subcontractors proposed for participation in the contract. Bidders awarded a contract are contractually obligated to use the subcontractors for the corresponding work identified unless the State agrees to a substitution and it is incorporated by amendment to the contract. Bidders who have been certified by California as a DVBE (or who are bidding rental equipment and have obtained the participation of subcontractors certified by California as a DVBE) must also submit a completed form(s) STD. 843 (Disabled Veteran Business Enterprise Declaration). All disabled veteran owners and disabled veteran managers of the DVBE(s) must sign the form(s). Should the form not be included with the solicitation, contact the State contracting official or obtain a copy online from the Department of General Services Procurement Division, Office of Small Business and DVBE Services (OSDS) website at www.pd.dgs.ca.gov/smbus. The completed form should be included with the bid response. At the State's option prior to award, bidders may be required to submit additional written clarifying information. Failure to submit the required written information as specified may be grounds for bid rejection.			
Payment Methodology: The State shall pay the awarded Contractor annually for the items covered in Attachment 1, Costing Sheet. The State agrees to pay the Contractor, upon receipt of an itemized invoice submitted by the Contractor, <u>in triplicate</u> to Franchise Tax Board ATTN: Fiscal Accounting P.O. Box 2800 Sacramento, CA 95812-2800			

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The following documents are considered part of this solicitation:

1. [Form GSPD-451](#), Bidder Instructions, Effective 7/1/10/ [Form GSPD-451, Bidder Instructions, Effective 7/01/10 ADA Version](#)
2. [IT General Provisions \(Revised and Effective 06/08/10\) /ADA Compliant Version](#)
3. [Information Technology Purchase Special Provisions](#), effective 02/08/07 [ADA Compliant version](#)
4. [Information Technology Software License Special Provisions](#), effective 01/21/03 [ADA Compliant version](#)
5. Attachment 1 – Costing Sheet
6. Attachment 2 – Statement of Work
7. Attachment 3 – California Disabled Veteran Business Enterprise Program Requirements Packet - waived
8. Attachment 4 – Bidder Declaration and DVBE Declaration
9. Attachment 5 – Small Business and Non-Small Business Preference
10. Attachment 6 – Target Area Contract Preference Act (TACPA), Enterprise Zone Act (EZA) and Local Agency Military Base Recovery Area (LAMBRA) Act Preferences.
11. Attachment 7 – Commercially Useful Function Documentation
12. Attachment 8 – Payee Data Record
13. Attachment 9 – Response Label (optional use)

Bidder Checklist for Quotation/Bid Submission:
In order for the quotation/bid to be acceptable, the following documents should be completed and included with your submitted quotation/bid response. A description of the nature of each document is included. **THOSE DOCUMENTS MARKED “MANDATORY” MUST BE RETURNED OR YOUR BID WILL BE REJECTED.** Those documents described as “should be submitted with your bid” will not cause your bid to be rejected; however, if they are included it will expedite the procurement process.

Document	Location	Description
Bidder Information and Signature	Pg. 1	Mandatory
Costing Sheet	Attachment 1	Mandatory
California Disabled Veteran Program Requirements Packet	Attachment 3	Waived
Bidder Declaration (GSPD-05-105)	Attachment 4	Mandatory
Seller's Permit	Pg. 2	This should be submitted with your bid; however it may be obtained prior to order award.
DVBE Declaration (STD. 843)	Attachment 4	Applies in the following situations: 1. The Prime Bidder is certified as a Disabled Veteran Business Enterprise, and/or, 2. There are subcontractors that are Certified Disabled Veteran Business Enterprises. These declarations should be included with the bid; however, they may be obtained prior to contract award.
Small Business Preference and Non-Small Business Preference	Attachment 5	Mandatory if applying for either preference.
Target Area Contract Preference Act, Local Agency Military Base Recovery Area and Enterprise Zone Act Preferences	Attachment 6	These are Mandatory if you are requesting any of these preferences.
Commercially Useful Function Requirements	Attachment 7	This applies to Certified Small Businesses and Certified Disabled Veteran Businesses submitting Bids as the Prime Contractor. This should be submitted with the bid; however it may be obtained prior to contract award. The State has the option to verify that the Prime Bidder and any subcontractors are performing a Commercially Useful Function.
Payee Data Record	Attachment 8	Applies to all bidders. This should be submitted with the bid; however, it may be obtained prior to award.
Technical Support Document		Required

RFQ FTB 1011-599**Attachment 1****Costing Sheet**

QTY	Part Number	Platform Component Specify: IVR, CTI/ACD, Other	Description of Products Software Identification	Year 1 06/10/11-06/09/12	Year 2 06/10/12-06/09/13	Year 3 06/10/13-06/09/14
1,135		CTI/ACD	Genesys CIM Platform - Multi-Site	\$	\$	\$
1,135		CTI/ACD	High Availability - CIM Platform	\$	\$	\$
1,135		CTI/ACD	Genesys InBound Voice	\$	\$	\$
1,135		CTI/ACD	High Availability - Voice	\$	\$	\$
576		IVR	Genesys Voice Platform - Enterprise Edition	\$	\$	\$
192		IVR	High Availability - Genesys Voice Platform- Enterprise Edition	\$	\$	\$
155		IVR	AIModule for Text-to-Speech (TTS)	\$	\$	\$
155		IVR	High Availability - AIModule	\$	\$	\$
1		Other	Genesys Info Mart Server	\$	\$	\$
1,135		Other	Genesys Info Mart Voice	\$	\$	\$
1,135		Other	High Availability - Genesys Info Mart	\$	\$	\$
1		Other	Genesys Agent Desktop .Net Toolkit	\$	\$	\$
1,135		Other	Agent Desktop .NET Connector	\$	\$	\$
1		Other	Genesys Configuration SDK	\$	\$	\$
1,135		Other	Configuration Connector	\$	\$	\$
1		Other	Genesys Statistics SDK	\$	\$	\$
1,135		Other	Statistics Connector	\$	\$	\$
155		IVR	SSFT Real Speak TTS	\$	\$	\$
155		IVR	SSFT Real Speak TTS - Spanish	\$	\$	\$
1		CTI/ACD	Genesys CIM Platform - Lab	\$	\$	\$
1		CTI/ACD	Genesys Inbound Voice - Lab	\$	\$	\$
1		Other	Genesys Info Mart - Lab	\$	\$	\$
1		IVR	Genesys Voice Platform - EE - Lab	\$	\$	\$
745		Other	Genesys Work Force Management	\$	\$	\$
1		Other	Genesys PS Toolkit	\$	N/A	N/A
1		Other	Genesys Interactive Insights	N/A	\$	\$
			SUB - Totals	\$	\$	\$
			Grand Total			\$

SOFTWARE IS PROVIDED BY: (Please indicate which applies to determine the applicable tax rate)		
Media (8.75%)	☐ Yes	☐ No
Electronic (0%)	☐ Yes	☐ No
Both (4.375%)	☐ Yes	☐ No

RFQ FTB 1011-599
Attachment 2

Statement of Work

Contractor will provide technical support for all Genesys Software used by FTB call centers. Refer to the costing sheet for the list of Genesys software being used.

The Principal Period of Maintenance for the Genesys software is twenty-four (24) hours a day, seven (7) days per week, annually.

Contractor will provide document as an attachment in the response that outlines the process in detail on how FTB requests technical support and how contractor provides the service. The document must contain the following information:

- Contact information for FTB to report problem and request support for both business hours and after business hours
- Procedure for FTB to submit requests for support
- Process of responding to FTB's requests
- Escalation Plans
- Specify preventive services provided if any
- Specify that updates to all supported Genesys Software to new release version will not incur additional charges to FTB
- Provide detail procedure on how to acquire new releases

Contractor will meet the expectation for response and resolution targets specified in the following charts for various severity levels of the supported Genesys Software issues/problems when they are reported by FTB:

Severity Level	Criteria	Response Targets	Resolution Targets
Critical	- Impacts a production/live environment. - Causes a severe impact on business operations of end customer (e.g. calls cannot be completed or critical business processes are disabled). Alternatively, causes a severe impact on business operations of a service provider due to the accumulated impact on multiple customers. - Continuous or near continuous interruption of service. - No workaround available.	60 Minutes (Critical severity issues will be reported or followed up via telephone by FTB)	Contractor will use reasonable efforts to continue to work on the problem until such problem is resolved or a workaround is provided.
High	- Impacts production/live environment or lab environment. - In lab environment, causes a serious impact on development activity (e.g. causes integration work to be blocked or delays completion of final system testing). - In production/live environment causes a serious impact on business operations of end customer (e.g. call processing altered in such a way as to degrade service quality or handling of business data). Alternatively, causes a serious impact on business operations of a service provider due to the accumulated impact on multiple	4 hours (High severity issues will be reported or followed up via telephone by FTB)	Contractor will use reasonable efforts to resolve the problem or provide a correction or workaround within two (2) business days after receipt of a complete problem description, including the business impact and log/configuration files from FTB. If a Licensed Software fix is required, Contractor will work with Genesys to correct the defect in the next Release.

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Severity Level	Criteria	Response Targets	Resolution Targets
	customers. - Intermittent disruption of service. - No stable workaround available.		
Medium	- Impacts production/live environment or lab environment. - In lab environment, causes a minor impact on development. - In production/live environment causes a minor impact on business operations of end customer (e.g. minimal degradation of call processing or handling of call data). Alternatively, causes a minor impact on business operations of a service provider due to the accumulated impact on multiple customers.	1 business day	Contractor will use reasonable efforts to resolve the problem or provide a workaround within five (5) business days after receipt of a complete problem description, including the business impact and log/configuration files from Customer. If a Licensed Software fix is required, Contractor will work with Genesys to correct the defect in the next Release.
Low	- Impacts production/live environment or lab environment. - In lab environment, causes little or no impact on development activity. - In production/live environment causes little or no impact on business operations of end user. Alternatively, causes little or no impact on business operations of a service provider due to the accumulated impact on multiple customers.	1 business day	Contractor will make reasonable efforts to resolve the problem or provide a workaround within ten (10) business days after receipt of a complete problem description, including the business impact and log/configuration files from Customer.

Contractor will collaborate with other FTB call center product support suppliers (Autonomy, Aastra, Virtual Hold Technology and AT&T) in resolving integration issues/problems should the Genesys Software have a problem working with their products of Qfiniti, PBX and Virtual Hold.

The State reserves the right to cancel the support contract at anytime with a 30 day notice to the Contractor.

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Attachment 3

CALIFORNIA DISABLED VETERAN BUSINESS ENTERPRISE PROGRAM REQUIREMENT PACKET

The State has established goals for Disabled Veteran Business Enterprises (DVBE) participating in State contracts. Bidders must complete and return all the appropriate pages in order for the bid to be considered responsive.

The CA DVBE Participation Requirements packet can be found at:
<http://www.documents.dgs.ca.gov/pd/poliproc/DVBEPROGREQ103107.doc>

“For Purposes of this solicitation, the DVBE program requirements are waived and there is no DVBE Incentive.”

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Attachment 4

BIDDER DECLARATION FORM GSPD-05-105

All bidders must complete the Bidder Declaration GSPD-05-105 and include it with the bid response.

<http://www.documents.dgs.ca.gov/pd/delegations/GSPD105.pdf>

DVBE DECLARATION FORM Std. 843
(If Applicable)

Bidders who have been certified by California as a DVBE (or who are bidding rental equipment and have obtained the participation of subcontractors certified by California as a DVBE) should also submit a completed form(s) STD. 843 (Disabled Veteran Business Enterprise Declaration). All disabled veteran owners and disabled veteran managers of the DVBE(s) must sign the form(s). Should the form not be included with the solicitation, contact the State contracting official or obtain a copy online from the Department of General Services Procurement Division, Office of Small Business and DVBE Services (OSDS) website at www.pd.dgs.ca.gov/smbus. The completed form should be included with the quotation/bid response. Please refer to the following URL for more details:

<http://www.documents.dgs.ca.gov/pd/poliproc/STD-843.pdf>

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Attachment 5

SMALL BUSINESS AND NON-SMALL BUSINESS PREFERENCE

1. Are you claiming preference as a Small Business?

YES _____ IF YES PROVIDE THE OSDS REFERENCE NUMBER _____

NO _____

If yes, submit your Small Business Certification document from the Department of General Services.

2. Are you a Non-Small Business requesting the 5% preference? This preference is available to non-small businesses claiming twenty-five percent (25%) California certified small business subcontractor participation. The subcontracting must be a Commercially Useful Function (CUF) in order to qualify for this preference. The State reserves the right to verify CUF prior to contract award.

YES _____ NO _____

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Attachment 6

TACPA, LAMBRA and EZA Preferences

The following preferences will be granted for this procurement. Bidders wishing to take advantage of these preferences will need to review the following websites and submit the appropriate response with the quotation/bid:

- TACPA: <http://www.pd.dgs.ca.gov/edip/tacpalang.htm>
- EZA: <http://www.pd.dgs.ca.gov/edip/eza.htm>
- LAMBRA: <http://www.pd.dgs.ca.gov/edip/lambra.htm>

Please Note: In accordance with 2 CCR section 1896.8 (e) the maximum SB quotation/bid preference allowed may not exceed \$50,000 for any quotation/bid, and the combined cost of preferences granted may not exceed \$100,000 total. Combined quotation/bid preferences and incentives (SB, recycle, DVBE, TACPA, EZA, and/or LAMBRA) may not exceed 15% for any quotation/bid or \$100,000 whichever is less.

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Attachment 7

COMMERCIALLY USEFUL FUNCTION DOCUMENTATION

All certified Small Business, Microbusiness, and/or DVBE contractors, subcontractors or suppliers must meet the commercially useful function requirements under Government Code, Section 14837(d)(4) (for SB) and Military and Veterans Code, Section 999(b)(5)(B0 (for DVBE).

Please answer the following questions, as they apply to your company for the goods/services being acquired in this procurement.

1	Will your company be responsible for the execution of a distinct element of the resulting purchase order?	Yes ___ No ___
2	Will your company be actually performing, managing, or supervising an element of the resulting purchase order?	Yes ___ No ___
3	Will your company be performing work on the resulting purchase order that is normal for its business, services, and functions?	Yes ___ No ___
4	Will there be any subcontracting that is greater than that expected to be subcontracted by normal industry practices for the resulting purchase order?	Yes ___ No ___

For a response of No in questions 1-3, or a response of Yes in question 4, may result in your bid being eliminated from consideration At the State's option prior to award, bidders may be required to submit additional written clarifying information.

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Attachment 8

Payee Data Record, STD. 204

The successful bidder as a result of this RFQ will be required to sign the Payee Data Record, STD. 204, before contract award. Refer to the following website link for more details:

<http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf>

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Attachment 9

RESPONSE LABEL

Affix the following label to the sealed cover for United Parcel Service (UPS), Federal Express, DHL or hand delivery to FTB's physical address:



QUOTATION/BID RESPONSE for **RFQ FTB 1011-599**

Franchise Tax Board
Attn: **Linda Turner**
Procurement & Asset Mgmt. (MS A374)
9646 Butterfield Way
Sacramento, CA 95827

**CONFIDENTIAL – TO BE OPENED BY
ADDRESSEE ONLY**
**QUOTATION/BID SUBMISSION BY April 6, 2011
1:00 pm**



Question and Answers for Bid #RFQ FTB 1011-599 - Software Maintenance

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.

Question Deadline: Mar 29, 2011 1:00:00 PM PDT