



# OCA TECHNOLOGY PURCHASING GUIDEBOOK

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# Introduction

# Introduction

## OCA Policy regarding Technology Purchases

All technology purchases must go through the Office of Contract Administration (“OCA”).

Depending on the purchase, it may be subject to review by the City and County of San Francisco’s Department of Technology (“DT”) in accordance with the [DT CIO Review Policy & Procedures](#).

**Departments may not use Prop Q (Departmental Delegated Authority) purchasing authority for technology purchases.**

## What is a Technology Purchase?

Technology goods or services include computers, hardware, software systems, software maintenance and telecommunications. All digital products that contain or transmit data and/or interact with the City’s networks in some manner are deemed to be a Technology Purchase by the City.

## Commodities v. Professional Services

The rules for purchasing differ when dealing with technology Commodities or Professional Services. Below is a summary of the main differences between these two categories when it comes to purchasing them on behalf of the City.

	Commodities	Professional Services (Or Commodities with Added Professional Services)
Solicitation Model	<ul style="list-style-type: none"><li>• Low Bid</li></ul>	<ul style="list-style-type: none"><li>• Request for Proposals (RFP)</li><li>• Request for Qualifications (RFQ)</li></ul>
Who Does the Solicitation?	<ul style="list-style-type: none"><li>• OCA. Exception: If there is any qualitative evaluation required, department should conduct an RFP.</li></ul>	<ul style="list-style-type: none"><li>• Department. Final results reviewed by OCA</li></ul>
Examples	<ul style="list-style-type: none"><li>• Hardware</li><li>• Software</li><li>• Standard software support</li><li>• Cloud computing software w/out technical services</li><li>• Non customized training</li></ul>	<ul style="list-style-type: none"><li>• Customization Services</li><li>• Configuration Services</li><li>• Integration Services</li><li>• Cloud computing software w/ technical services</li><li>• Managed Services</li><li>• Customized Training</li></ul>

## Different Options for Purchasing Technology

As discussed in greater detail further on in this guide, there are three ways by which to purchase technology, each with its own set of rules and procedures. These three methods are:

1. Public Bid / Direct Contract
2. Technology Marketplace Resellers
3. DT and OCA Enterprise Agreements

## Naming Convention for IT Requisitions

It is important that departments enter requisition titles using the department Identifier followed by "IT" so that OCA knows it is an IT-related request and what department it is for. *Failure to adhere to this convention will result in your request being returned for correction.*

### Illustrative Examples:


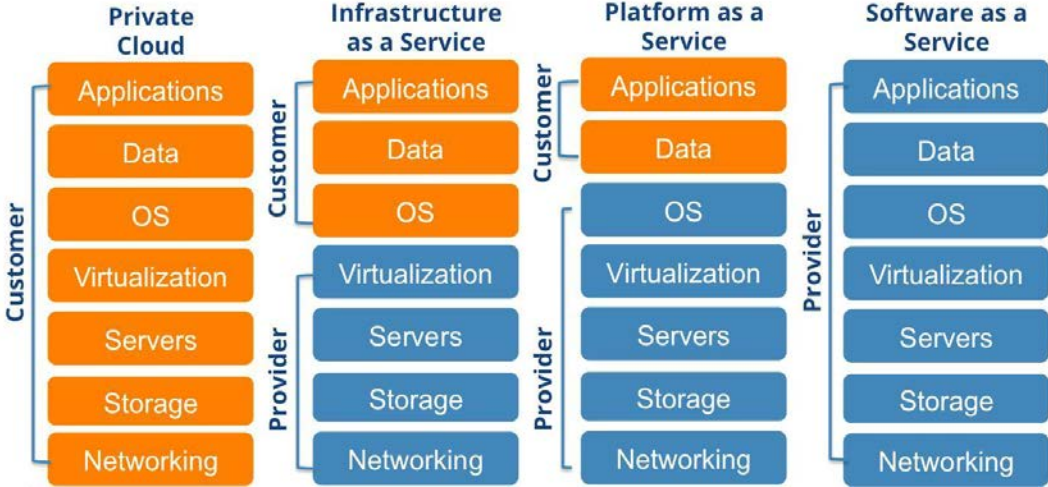
- **DT-IT** 102726 STG MAINT RENEWAL
- **HSA-IT** QTS Maintenance

## NIGP Codes for All Technology Purchases and Recommended Account Codes

Category	NIGP/Category Code	PeopleSoft Account Code (Recommended)
HARDWARE (NON TELECOMMUNICATION)	<b>20400</b>	<ul style="list-style-type: none"> <li>• 549210 or 549250</li> <li>• 560610 (if capitalized)</li> </ul>
SOFTWARE LICENSES	<b>20900</b>	<ul style="list-style-type: none"> <li>• 535960 (Software)</li> </ul>
SOFTWARE / HARDWARE SUPPORT  <i>*New 10/10/19</i>	<b>92047</b>	<ul style="list-style-type: none"> <li>• 535960 (Software Maintenance)</li> <li>• 529990 (Equipment Maintenance)</li> </ul>
PROFESSIONAL / TECHNICAL SERVICES	<b>92000</b>	<ul style="list-style-type: none"> <li>• 527610 (Technical Services)</li> </ul>
IT-RELATED TRAINING  <i>*New 10/10/19</i>	<b>92405</b>	<ul style="list-style-type: none"> <li>• 522020 (Training)</li> </ul>
TELECOMMUNICATION/ MEDIA PRODUCTS	<b>72500</b>	<ul style="list-style-type: none"> <li>• 549210 or 549250</li> <li>• 560610 (if capitalized)</li> </ul>
TELECOMMUNICATION/ MEDIA SERVICES	<b>91500</b>	<ul style="list-style-type: none"> <li>• 527610 (Services)</li> <li>• 522020 (Training)</li> </ul>
CALIFORNIA RECYCLING FEE	<b>96339</b>	<ul style="list-style-type: none"> <li>• 535990</li> </ul>

## Data Storage: On Premise/Private Cloud v. Cloud Computing

Traditionally, the City kept all data within its own network, i.e. "on premise". Today, there are many options that allow us to instead outsource the task of storing data by sending the data to the "cloud." Below is a brief overview of each model.

<p><b>On Premise / Private Cloud</b></p>	<p>The product and the data that it keeps are located within the physical confines of the CITY'S enterprise. Whether a software, network, data center or application, THE CITY maintains the system(s) and access to City data.</p>
<p><b>Non-Private Cloud Computing</b></p> 	<p>The product and the data that it keeps are hosted within the physical confines of a SERVICE PROVIDER's enterprise not under the direct control of the City. THE SERVICE PROVIDER, not the City, maintains the system(s) and access to City data.</p> <p>When using this option, proceed with caution because the City is giving up or limiting its control of its systems and/or data.</p> <p><b>Cloud Computing Models:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Software as a Service (SaaS)</li> <li><input type="checkbox"/> Infrastructure as a Service (IaaS)</li> <li><input type="checkbox"/> Platform as a Service (PaaS)</li> <li><input type="checkbox"/> Desktop as a Service (DaaS)</li> <li><input type="checkbox"/> Backend as a Service (BaaS)</li> <li><input type="checkbox"/> IT as a Service (ITaaS)</li> </ul> <p><b>On Premise v. Cloud: Examples of Who Controls What?</b></p> 

## The City's Policy on Cloud Computing

The City encourages the use of cloud services when:

- It is more cost-efficient relative to managing data and computing in-house;
- Potential risks are considered and mitigated; and
- Interoperable systems throughout City are supported by the use of cloud-computing.

Prior to moving data to the Cloud, Departments **must first conduct a risk assessment** to identify data security/privacy issues and how to mitigate them. If they can't be mitigated adequately, then a Cloud solution is not appropriate.

Data/System Classification	Potential Risk	Description	Appropriate for the Technology Marketplace?
Level 1: Public	None - Low	Data available for public access or release.	Yes
Level 2: Internal Use	Low	Data that is normal operating information but not proactively released to the public. Viewing and use is intended for employees; could be made available Citywide or to specific employees in a department, division or business unit. Certain data may be made available to external parties upon their request.	Yes
Level 3: Sensitive	Low	Data intended for release on a need-to-know basis. Data regulated by privacy laws or regulations or restricted by a regulatory agency or contract, grant, or other agreement terms and conditions.	Yes
Level 3: Sensitive	Moderate	Data that triggers requirement for notification to affected parties or public authorities in case of a security breach.	No
Level 4: Protected	Moderate	Data poses direct threats to human life or catastrophic loss of major assets and critical infrastructure (e.g. triggering lengthy periods of outages to critical processes or services for residents).	No
Level 5: Restricted	High	Data poses direct threats to human life or catastrophic loss of major assets and critical infrastructure (e.g. triggering lengthy periods of outages to critical processes or services for residents).	No

# **DT CIO**

# **Review Policy**



# DT CIO Review Policy & Procedures

IT procurements are assessed by the Chief Information Officer (CIO), primarily for the following purposes:

1. Assessing network security risks associated with IT procurements;
2. Minimizing degradation of network performance due to IT procurements that introduce added complexity or potentially incompatible infrastructure to City data networks; and
3. Evaluating the potential for strategic sourcing efforts.

## Preapproved IT Procurements

**Standard items with no perceived impact to cybersecurity and/or network performance do not require review.** However, DT shall review those items, whether identified as preapproved or not, that may create a potential cybersecurity vulnerability or network performance issue.

**IT procurements are deemed preapproved if ALL items in the procurement appear on the preapproved list below:**

1. Desktop computers, laptops, tablets, monitors, keyboards, mice, desktop printers, accessories (e.g. connection cables and adapters), ink cartridges, and toner
2. Cat 6 (ethernet) cable, fiber, patching and splicing materials and other associated tools and supplies
3. Software products purchased under a Department of Technology Enterprise Agreement.
4. Renewal or extension of existing software licenses, subscriptions or support that previously received CIO review and approval
5. Hardware maintenance or support contracts
6. Technology Training
7. Procurements initiated by the Department of Technology (since they are subject to an internal CIO review process)

Please consult with DT for the most recent list of preapproved items. If you are unsure whether a proposed procurement is one of the preapproved items, please submit the procurement for CIO review via [ServiceNow](#).

## How to Initiate CIO Review

Departments initiate CIO review via DT's online [ServiceNow](#) platform.

## CIO Review Timeline and Notification

If DT does not respond within 5 business days, the requestor will receive an email indicating the request is deemed approved through CIO Review. Requestors will receive emails from DT indicating whether their request is approved, on hold for further review, or on hold pending further information from the requestor.

## Document CIO Review Approval in PeopleSoft

Upon submission, user will receive an email confirmation. Once CIO Approval email is received, upload this email into PeopleSoft as proof of DT CIO approval.

# **How does the City buy Technology?**

# How does the City buy Technology?

There are three ways by which to purchase technology, each with its own set of rules and processes. A comprehensive comparison between Options 2 and 3 follows this page.

## Option 1: Enterprise Agreements administered by DT or OCA

DT and OCA each administer Enterprise Agreements (EA) for specific software and hardware products that can be used by City departments. The list of active EAs changes frequently.

- **DT's EAs can be found here:** [EA contracts](#). Contact [CityEA@sfgov.org](mailto:CityEA@sfgov.org) for instructions on how to use each EA. You may be able to issue a PO directly against the EA or be required to work order the money to DT to issue the PO on your behalf.
- **OCA's EAs and instructions on their use can be found** [here](#).

## Option 2: The City's Technology Marketplace Pool of Prequalified Resellers (Preferred Method)

The City's Technology Marketplace Pool consists of 40+ suppliers with whom OCA has previously negotiated multi-year Term Contracts for as-needed purchases of technology goods and services. Because the suppliers were awarded contracts pursuant to an RFP completed by OCA, there is no need for a public bid for each transaction. As such, this option is the preferred and fastest method by which to procure IT goods and services.

**Funding Considerations:** A purchase through the Technology Marketplace results in a Purchase Order being issued to the Technology Marketplace reseller against its contract with the City. Because the purchase results in a Purchase Order, and not a departmental contract, the department must be able to provide the **full** funding upfront. However, under limited circumstances, OCA may allow purchase orders issued through the Technology Marketplace to be funded over time via change orders, so long as all approvals were obtained at full amount.

The Technology Marketplace currently consists of three "Tiers" of suppliers, each with its own limitations. They are discussed in the table following this page. Use the applicable checklist to submit a requisition under this Option.

- [Appendix A: Technology Marketplace \(TM\) Checklist: Commodities](#)
- [Appendix B: Technology Marketplace \(TM\) Checklist: Professional Services](#)
- [Appendix C: Technology Marketplace \(TM\) Suppliers](#)

## Option 3: Public Bidding/Direct Contracting with an Entity not in the City's Technology Marketplace Pool

This option should be used when it is not possible to go through the Technology Marketplace Pool. It is also the required option if a purchase exceeds \$2.5MM or if you are purchasing something for which a DIRECT relationship with the supplier is preferred. This includes cloud computing purchases involving the storage of sensitive data. This option is the lengthiest option because:

- (1) A formal solicitation (or approved solicitation waiver) is required; and
- (2) The department must negotiate a multi-year direct contract complying with a wide range of City requirements and approved by multiple agencies. City Contract Templates are available [HERE](#).

## Comparison: Technology Marketplace Process v. Public Bidding / Direct Contracting

	Technology Marketplace Term Contracts	Public Bid / Direct Contract									
<b>Duration</b>	1-4 weeks	4 + months									
<b>OK to Name Manufacturer?</b>	<b>Yes.</b> However, cannot name potential subcontractors when professional services are involved.	<b>No.</b> Provide specs or make formal request to OCA for a “No Substitute”.									
<b>Purchasing Method</b>	<ul style="list-style-type: none"> <li>Department submits a Requisition in PeopleSoft for OCA review. If approved, OCA issues a Purchase Order to the Technology Marketplace reseller. The Purchase Order draws down on the Technology Marketplace reseller’s Term Contract with the City and is subject to its terms and conditions.</li> <li>Department cannot sign any agreements.</li> <li>Department must abide by manufacturer license and support use terms only. All other matters are governed by the Term Contract between the Technology Marketplace reseller and City.</li> </ul>	<ul style="list-style-type: none"> <li>Department negotiates a <b>multi-year contract</b> directly with supplier. Once contract has been approved, Department issues POs against it. <b>City Contract Templates are available <a href="#">HERE</a>.</b></li> <li><b>Standalone Requisition to Purchase Order permitted <u>only</u> for hardware purchases w/out software licensing requirements and/or equipment maintenance. Contact OCA for approval prior to submitting a Requisition instead of a Contract.</b></li> </ul>									
<b>Technology Offerings Available for Purchase</b>	<table border="1"> <thead> <tr> <th>Tier 1</th> <th>Tier 2</th> <th>Tier 3</th> </tr> </thead> <tbody> <tr> <td>All products and services, including cloud products if data is at or below “Level 3-Low” sensitivity.</td> <td>All products and services, <i>except</i> cloud products.</td> <td>Products and services for which the company is LBE certified. <i>Cannot sell cloud products.</i></td> </tr> </tbody> </table>	Tier 1	Tier 2	Tier 3	All products and services, including cloud products if data is at or below “Level 3-Low” sensitivity.	All products and services, <i>except</i> cloud products.	Products and services for which the company is LBE certified. <i>Cannot sell cloud products.</i>	All products and services.			
Tier 1	Tier 2	Tier 3									
All products and services, including cloud products if data is at or below “Level 3-Low” sensitivity.	All products and services, <i>except</i> cloud products.	Products and services for which the company is LBE certified. <i>Cannot sell cloud products.</i>									
<b>Transaction Limits</b>	<table border="1"> <thead> <tr> <th>Tier 1</th> <th>Tier 2</th> <th>Tier 3</th> </tr> </thead> <tbody> <tr> <td><b>Commodities:</b> \$2,500,000</td> <td><b>Commodities:</b> \$2,500,000</td> <td><b>Commodities:</b> \$129,000</td> </tr> <tr> <td><b>Services:</b> \$2,500,000</td> <td><b>Services:</b> \$2,500,000</td> <td><b>Services:</b> \$600,000</td> </tr> </tbody> </table>	Tier 1	Tier 2	Tier 3	<b>Commodities:</b> \$2,500,000	<b>Commodities:</b> \$2,500,000	<b>Commodities:</b> \$129,000	<b>Services:</b> \$2,500,000	<b>Services:</b> \$2,500,000	<b>Services:</b> \$600,000	None.
Tier 1	Tier 2	Tier 3									
<b>Commodities:</b> \$2,500,000	<b>Commodities:</b> \$2,500,000	<b>Commodities:</b> \$129,000									
<b>Services:</b> \$2,500,000	<b>Services:</b> \$2,500,000	<b>Services:</b> \$600,000									
<b>Competitive Solicitation Thresholds</b>	<table border="1"> <thead> <tr> <th>Tier 1</th> <th>Tier 2</th> <th>Tier 3</th> </tr> </thead> <tbody> <tr> <td> <p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul> </td> <td> <p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul> </td> <td> <p>≤ 129K: Bid not required.</p> <hr/> <p>&gt; \$129K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> N/A</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul> </td> </tr> </tbody> </table>	Tier 1	Tier 2	Tier 3	<p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>	<p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>	<p>≤ 129K: Bid not required.</p> <hr/> <p>&gt; \$129K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> N/A</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>	<p>≤ \$10K: Bid not required</p> <hr/> <p>&gt; \$10K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA</li> <li><b>Services or Commodities mixed with Services:</b> Bid out by Dept</li> </ul> <hr/> <p><b>Solicitation Waiver Request:</b> Dept. may request to waive solicitation requirements.</p> <ul style="list-style-type: none"> <li><a href="#">Guide to Request to Waive Solicitation Requirements.pdf</a></li> <li><a href="#">ServiceNow Website</a></li> </ul>			
Tier 1	Tier 2	Tier 3									
<p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>	<p>≤ \$25K: Bid not required.</p> <hr/> <p>&gt; \$25K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> Bid out by OCA.</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>	<p>≤ 129K: Bid not required.</p> <hr/> <p>&gt; \$129K:</p> <ul style="list-style-type: none"> <li><b>Commodities:</b> N/A</li> <li><b>Services (or Commodities mixed with Services):</b> RFP by Dept.</li> </ul>									

Solicitation Audience	<b>Must choose from one of three Technology Marketplace Tiers of resellers.</b> Cannot mix Tiers.	<ul style="list-style-type: none"> <li>• <b>All possible suppliers.</b></li> <li>• <b>Supplier must possess City Supplier ID, Valid Business Tax License and be 12B Compliant. (12B Exception: “21.30” Software Licenses/Maintenance purchases under \$10MM)</b></li> </ul>
<b>Civil Service Approval</b> (Professional Services Only)	<p>Not required.</p> <p>Submit request to <a href="#">Local 21</a>. If there are no objections after 10 days, the purchase is deemed approved.</p>	<p>Required.</p> <p>&lt;\$100K: Expedited 7 day review &gt;\$100K: Min. 30 days for union review and then full commission hearing.</p>
<b>Other City Agency Approvals</b>	<ul style="list-style-type: none"> <li>• <b>DT CIO Approval</b>, if applicable. See <a href="#">DT CIO Review Policy &amp; Procedures</a>.</li> <li>• <b>CMD</b>: Forms 2A and 2B if Professional Services over \$129K.</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple agencies.</li> <li>• Use applicable <a href="#">OCA checklist</a> to guide you through approval process.</li> </ul>

# Appendices

## Checklists for Purchasing Commodities and Services through the *Technology Marketplace*

These checklists apply ONLY to purchases made through the City's Technology Marketplace resellers with whom OCA has existing contracts. Open the file below to view the City's current Technology Marketplace resellers.

<\\GSA-SVR1\Data\OCA\New Drive Organization\Department Folders\IT\2.0 Tech Marketplace\TM Suppliers Email Lists\TM Resellers by Tier.xlsx>

**Do not use these checklists for transactions that are made through entities other than the City's Technology Marketplace resellers.** All transactions that are made through entities other than the City's Technology Marketplace resellers must follow the City's standard public purchasing and contracting requirements. Further, where the technology purchase involves software, support and/or equipment maintenance, departments may not use the Requisition to PO process. Instead, they must follow the City's contracting procedures for setting up multi year contracts. Prior to vendor selection and contract negotiations, and unless solicitation requirements are waived by OCA, the department must first ask OCA to conduct a public solicitation on its behalf (for commodities) or conduct an Request for Proposals (for services).

# Appendix A: Technology Marketplace Checklist: **Commodities**

Do not use for Public Solicitations to Non Technology Marketplace Resellers

Upload all files to the Requisition **“Comments and Attachments”** field.

<b>Commodities Solicitation Thresholds</b>	<table border="1"> <thead> <tr> <th data-bbox="316 315 649 357">Tier 1</th> <th data-bbox="657 315 1015 357">Tier 2</th> <th data-bbox="1023 315 1529 357">Tier 3</th> </tr> </thead> <tbody> <tr> <td data-bbox="316 367 649 483">                     ≤ \$25K: Bid not required                      &gt; \$25K: Bid out by OCA.                 </td> <td data-bbox="657 367 1015 483">                     ≤ \$25K: Bid not required                      &gt; \$25K: Bid out by OCA.                 </td> <td data-bbox="1023 367 1529 483">                     ≤ 129K: Bid not required                      &gt; \$129K: N/A – PO for Commodities cannot exceed \$129K.                 </td> </tr> </tbody> </table>	Tier 1	Tier 2	Tier 3	≤ \$25K: Bid not required > \$25K: Bid out by OCA.	≤ \$25K: Bid not required > \$25K: Bid out by OCA.	≤ 129K: Bid not required > \$129K: N/A – PO for Commodities cannot exceed \$129K.
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<b>Solicitation Documents</b>	<p><b>(1) Quote:</b></p> <p><b>If No Solicitation Required:</b></p> <ul style="list-style-type: none"> <li>Upload quote from any TM supplier authorized to sell the goods.</li> </ul> <p><b>If Solicitation Required:</b></p> <ul style="list-style-type: none"> <li>Upload quote from TM supplier or Manufacturer for OCA to use to bid out. Quote must include <b>universal part numbers</b> and descriptions. If applicable, ensure the department’s <b>account details</b> (e.g. Account ID, Serial #'s) are included so that all bidders understand what is being purchased and for whom. Include manufacturer’s account representative information if available for bidders to contact with questions.</li> </ul> <p><b>(2) Manufacturer terms related to use of license/support:</b> Terms related to use of the license/support are required if you are purchasing any kind of software (Cloud or non-cloud) as part of the purchase.</p> <ul style="list-style-type: none"> <li>Upload manufacturer use/support terms into PS or provide the link in your requisition.</li> </ul>						
<b>DT Review Documents</b>	<p><b>(3) DT CIO Review:</b> Refer to <a href="#">DT CIO Review Policy &amp; Procedures</a> to determine if DT review is required. Using <a href="#">DT’s Service Now</a> platform, submit your request to DT for approval.</p> <ul style="list-style-type: none"> <li>Upload approved DT CIO request email into PeopleSoft as proof of DT CIO approval.</li> </ul>						
<b>Requisition Details</b>  <p><i>You must provide this information in addition to completing all required requisition fields.</i></p>	<p><b>(4) Category Codes:</b></p> <p>A. For each line item, select the appropriate and correct <a href="#">Category Code</a>.</p> <p><b>(5) In the Requisition <b>“Comments and Attachments”</b> field, provide:</b></p> <p>B. <b>Shipping Information</b>, including Contact Name and Email. <i>Required even if no physical delivery.</i></p> <p>C. <b>Billing Information</b>, including Contact Name and Email</p> <p>D. <b>License Registration Email</b>, if purchasing software or SW/HW support</p> <p><b>(6) In the Requisition <b>“Approval Justification”</b> field, answer each question below:</b></p> <p>A. What are you buying and why?</p> <p>B. Did the IT Director of your Department approve?</p> <p>C. Will you be funding this purchase upfront in full or through change orders?</p> <p>D. Does this transaction result in data being hosted in the cloud?</p> <p>E. If yes to above question, is the data security <b>“Level 3-Low”</b> or lower? See the <a href="#">City’s Policy on Cloud Computing</a> for details. If you answer No to this question, contact OCA before proceeding.</p> <p>F. Are you asking OCA to bid this purchase out for you? If yes, to which TM Tier?</p>						



## Appendix B: Technology Marketplace Checklist: **Services**

Upload all files to the Requisition "Comments and Attachments" field.

Services Solicitation Thresholds	Tier 1	Tier 2	Tier 3
	<p>≤ \$25K: Bid not required &gt; \$25K: Bid out by Dept.</p>	<p>≤ \$25K: Bid not required &gt; \$25K: Bid out by Dept.</p>	<p>≤ \$129K: Bid not required &gt; \$129K: Bid out by Dept.</p>
<p><b>Solicitation Documents</b></p>	<p><b>(1) Solicitation Documents:</b>  <b>If No Solicitation Required:</b></p> <ul style="list-style-type: none"> <li>• Upload quote and Scope of Work (SOW) from any TM supplier authorized to sell the services.</li> </ul> <p><b>If Solicitation Required:</b></p> <ul style="list-style-type: none"> <li>• Conduct solicitation at department level and upload each file below separately, using the naming convention below: <ul style="list-style-type: none"> <li>A. RFP</li> <li>B. PDF copy of email notifying all authorized resellers in selected tier of the RFP</li> <li>C. Combined file containing all proposals received</li> <li>D. Proposal evaluation</li> <li>E. Selected Quote</li> <li>F. Selected SOW</li> </ul> </li> </ul> <p><b>(2) Manufacturer terms related to use of license/support:</b> Terms related to use of the license/support are required if you are purchasing any kind of software (Cloud or non-cloud) as part of the purchase.</p> <ul style="list-style-type: none"> <li>• Upload manufacturer use/support terms, if applicable, into PS or provide the link in your requisition</li> </ul>		
<p><b>DT Review Documents</b></p>	<p><b>(3) DT CIO Review:</b> DT CIO Review is required for <u>all</u> professional services requests (exception: IT Training services). Using <a href="#">DT's Service Now</a> platform, submit your request to DT for approval.</p> <ul style="list-style-type: none"> <li>• Upload approved DT CIO request email into PeopleSoft as proof of DT CIO approval.</li> <li>• Approved amount must equal estimated project spend, regardless of initial PO amount.</li> </ul>		
<p><b>Local 21 Documents</b></p>	<p><b>(4) Local 21 Review:</b> Local 21 Review is required for <u>all</u> professional services requests. Submit request to <a href="#">Local 21</a> using their web portal. Upon completing your submission, you will receive an email confirmation. If there are no objections after 10 business days, the purchase is deemed approved.</p> <ul style="list-style-type: none"> <li>• Upload L21 Confirmation Email into PeopleSoft as proof of Local 21 submission.</li> <li>• Approved amount must equal estimated project spend, regardless of initial PO amount.</li> </ul>		
<p><b>CMD Documents</b></p>	<p><b>(5) CMD Forms 2A and 2B + Approval email from CMD:</b> CMD Forms 2A &amp; 2B approval is required for professional services over \$129,000. Request forms from Proposer and submit them to CMD (currently <a href="#">Selormey Dzikunu</a>), along with the SOW and Quote, for approval.</p> <ul style="list-style-type: none"> <li>• Upload CMD Email Approval into PeopleSoft as proof of CMD approval.</li> <li>• Approved amount must equal estimated project spend, regardless of initial PO amount.</li> </ul>		

**Requisition  
Details**

*You must  
provide this  
information  
In addition  
to  
completing  
all required  
requisition  
fields*

- (6) **Category Codes:** For each line item, select the appropriate and correct [Category Code](#).
- (7) **In the Requisition “[Comments and Attachments](#)” field, provide:**
- A. **Shipping Information.** Include Contact Name and Email. *Required even if no physical delivery.*
  - B. **Billing Information.** Include Contact Name and Email.
  - C. **License Registration Email,** if purchasing software or SW/HW support.
- (8) **In the Requisition “[Approval Justification](#)” field, answer each question below:**
- A. **What are you buying and why?**
  - B. **What is the total estimated project spend?**
    - The total estimated project amount must have a justifiable correlation to the RFP and/or Proposal.
    - You may only exceed the stated total estimated project amount by 20%.
  - C. **Will you be funding this project upfront in full or through change orders?**
  - D. **Did the IT Director of your Department approve?**
  - E. **Does this transaction result in data being hosted in the cloud?**
  - F. **If yes to above question, is the data security “Level 3-Low” or lower?** See the [City’s Policy on Cloud Computing](#) for details. If you answer No to this question, contact OCA before proceeding.

## Appendix C: Technology Marketplace Suppliers

TIER 1					PRODUCTS										SERVICES			
Supplier	Supplier ID	Contact Person	Email for Solicitations	Contract ID	CLOUD	CISCO	DELL	HP	HPE	IBM	JUNIPER	MICROSOFT	VMWARE	ALL OTHER	HARDWARE SUPPORT	TRAINING	PROF. SERVICES	
CCS Global Tech	0000032444	Raminder Singh (primary) MBEprogram@ccsglobaltech.com (858)208-4131 Dustin Langdon dlangdon@ccsglobaltech.com (858)435-4878	<a href="mailto:MBEprogram@ccsglobaltech.com">MBEprogram@ccsglobaltech.com</a> <a href="mailto:Gov@ccsglobaltech.com">Gov@ccsglobaltech.com</a> <a href="mailto:dlangdon@ccsglobaltech.com">dlangdon@ccsglobaltech.com</a> <a href="mailto:mkhlaghi@ccsglobaltech.com">mkhlaghi@ccsglobaltech.com</a>	1000012601	X												X	X
CDW Government	0000023205	Alex Picchietti ccsf@cdwg.com (877)707-7850 Jason Schwartz JasonS@cdw.com (847)419-7542 Sherri McLean shermcl@cdw.com (312)705-9381 / (312)218-1450	<a href="mailto:ccsf@cdwg.com">ccsf@cdwg.com</a> <a href="mailto:JasonS@cdw.com">JasonS@cdw.com</a> <a href="mailto:shermcl@cdw.com">shermcl@cdw.com</a>	1000012602		X	X	X	X	X	X	X	X	X	X	X	X	X
Central Computers	0000023129	Chester Yeung chester@centralcomputer.com (415)495-5888 x8122	<a href="mailto:sfgov@centralcomputer.com">sfgov@centralcomputer.com</a> <a href="mailto:chester@centralcomputer.com">chester@centralcomputer.com</a>	1000012603		X	X	X	X	X	X	X	X	X	X			X
ComputerLand	0000022410	Cathy Souza csouza@cland.com (408)519-3230	<a href="mailto:sfgovsales@cland.com">sfgovsales@cland.com</a> <a href="mailto:csouza@cland.com">csouza@cland.com</a>	1000012604	X	X	X	X	X	X	X	X	X	X	X	X	X	X
ConvergeOne	0000030047	Adam Eisenberg aeisenberg@convergeone.com (415)969-6880 Joanna Villafana Jvillafana@convergeone.com (909)230-7068	<a href="mailto:aeisenberg@convergeone.com">aeisenberg@convergeone.com</a> ; <a href="mailto:JVillafana@convergeone.com">JVillafana@convergeone.com</a> ;	1000012605	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cornerstone JV	0000022243	Derek Lawson dlawson@cornerstoneconcilium.com (415)705-7800 x228	<a href="mailto:dlawson@cornerstoneconcilium.com">dlawson@cornerstoneconcilium.com</a> <a href="mailto:tdu@cornerstoneconcilium.com">tdu@cornerstoneconcilium.com</a> <a href="mailto:epitts@ssp.com">epitts@ssp.com</a> <a href="mailto:sandesh@ssp.com">sandesh@ssp.com</a> <a href="mailto:nhodges@ssp.com">nhodges@ssp.com</a>	1000012606	X	X	X	X	X	X	X		X	X	X	X	X	X
DPP Tech	0000020897	Puran Moorjani pm@dppotech.com (925)914-7000	<a href="mailto:pm@dppotech.com">pm@dppotech.com</a>	1000012607	X													X
Dynamic Systems	0000021099	Ken Clement ken.clement@dynamicssystemsinc.com (916)872-3521 Lisa Jensen lisa.jensen@dynamicssystemsinc.com (877)374-4468 x222	<a href="mailto:CCSF@dynamicssystemsinc.com">CCSF@dynamicssystemsinc.com</a>	1000012608	X	X	X		X	X	X		X	X	X			X

## TIER 1 (continued)

TIER 1 (continued)					PRODUCTS										SERVICES		
Supplier	Supplier ID	Contact Person	Email for Solicitations	Contract ID	CLOUD	CISCO	DELL	HP	HPE	IBM	JUNIPER	MICROSOFT	VMWARE	ALL OTHER	HARDWARE SUPPORT	TRAINING	PROF. SERVICES
En Pointe	0000020671	Kathy Perez Kperez@enpointe.com (800)819-7501	<a href="mailto:ccsfquotes@pcm.com">ccsfquotes@pcm.com</a> <a href="mailto:kperez@enpointe.com">kperez@enpointe.com</a>	1000012609	X	X	X	X	X	X	X	X	X	X	X	X	X
Intervision	0000030163	Sarah Fletcher Sarah.Fletcher@intervision.com (408)567-4259 Ted Callagy ted.callagy@intervision.com	<a href="mailto:ted.callagy@intervision.com">ted.callagy@intervision.com</a>	1000012610	X	X	X		X		X		X	X	X		X
Presidio Networked Solutions	0000012909	Dan Ornelas dornelas@presidio.com (415)501-9011	<a href="mailto:dornelas@presidio.com">dornelas@presidio.com</a>	1000012611	X	X	X	X	X	X	X	X	X	X	X		X
Robert Half	0000012107	Christine Vo christine.vo@rht.com (415)434-4940 x21253 Jeff Reinders jeff.Reinders@roberthalf.com	<a href="mailto:techmarket@roberthalf.com">techmarket@roberthalf.com</a> <a href="mailto:christine.vo@rht.com">christine.vo@rht.com</a> <a href="mailto:jeff.Reinders@roberthalf.com">jeff.Reinders@roberthalf.com</a>	1000012612	X							X					X
Slalom	0000010886	Eli Hill elih@slalom.com (650)305-0807 John Pavel john.pavel@slalom.com (415)593-3450	<a href="mailto:elih@slalom.com">elih@slalom.com</a>	1000012613	X												
Softnet Solutions	0000010802	John Galluccio johng@softnets.com (408)542-0888	<a href="mailto:johng@softnets.com">johng@softnets.com</a>	1000012614			X	X	X	X		X			X		X
Stellar Services	0000010447	Chris Donohue cdonohue@stellarservices.com (505)660-9889	<a href="mailto:cdonohue@stellarservices.com">cdonohue@stellarservices.com</a>	1000012615												X	X
Variety	0000037842	Alex Dang adang@variety.com (949)610-4232	<a href="mailto:adang@variety.com">adang@variety.com</a>	1000012616	X												
World Wide Technology	0000008050	Carol Harting carol.harting@wwt.com (636)751-8399 Daniel Hopkins daniel.hopkins@wwt.com (925)366-1665	<a href="mailto:carol.harting@wwt.com">carol.harting@wwt.com</a> <a href="mailto:ccsf@wwt.com">ccsf@wwt.com</a> <a href="mailto:daniel.hopkins@wwt.com">daniel.hopkins@wwt.com</a>	1000012617		X	X	X		X	X	X	X	X		X	X
Xtech JV	0000008003	John Eaton jeaton@eatonassoc.com (415)282-1188 x233 Brad Baker brad.baker@21tech.com	<a href="mailto:Sales@XtechJV.com">Sales@XtechJV.com</a> <a href="mailto:Sales@21tech.com">Sales@21tech.com</a> <a href="mailto:Xtech@eatonassoc.com">Xtech@eatonassoc.com</a> <a href="mailto:brad.baker@21tech.com">brad.baker@21tech.com</a> <a href="mailto:jeaton@eatonassoc.com">jeaton@eatonassoc.com</a>	1000012618	X	X	X	X	X	X	X	X	X	X	X	X	X
Zones	0000038064	Kenneth Mollison kenneth.mollison@zones.com (916)549-4474	<a href="mailto:SF@zones.com">SF@zones.com</a> <a href="mailto:Kenneth.Mollison@zones.com">Kenneth.Mollison@zones.com</a> <a href="mailto:Saad.Bhatti@zones.com">Saad.Bhatti@zones.com</a>	1000012619	X	X	X	X	X	X	X	X	X	X	X	X	X

## TIER 2

TIER 2					PRODUCTS										SERVICES			
Supplier	Supplier ID	Contact Person	Email for Solicitations	Contract ID	CLOUD	CISCO	DELL	HP	HPE	IBM	JUNIPER	MICROSOFT	VMWARE	ALL OTHER	HARDWARE SUPPORT	TRAINING	PROF. SERVICES	
Ameritech	0000025514	Herrick Loi Herrick@ameritechcomputer.com (415)282-6500	<a href="mailto:Herrick@ameritechcomputer.com">Herrick@ameritechcomputer.com</a>	1000012721	NOT AUTHORIZED TO SELL CLOUD	X	X	X	X	X		X		X	X		X	
Bridge Micro	0000024019	Byron Ling Byron.ling@bridgemicro.net (415)902-1075	<a href="mailto:Byron.ling@bridgemicro.net">Byron.ling@bridgemicro.net</a>	1000012722		X	X	X	X	X		X	X	X				
Delta Computer Solutions	0000021575	Steve Ike Account Manager sike@deltacs.com (415)519-4063	<a href="mailto:sike@deltacs.com">sike@deltacs.com</a>	1000012723												X	X	X
Elyon	0000032448	Karen Morphy karenmorphy@elyonstrategies.com (916)652-7789	<a href="mailto:karenmorphy@elyonstrategies.com">karenmorphy@elyonstrategies.com</a>	1000012724											X		X	X
Ipso Facto	0000018143	Jeff Stauffer jeff@ipsofacto.net (415)362-2922	<a href="mailto:jeff@ipsofacto.net">jeff@ipsofacto.net</a>	1000012725			X			X		X	X	X	X	X	X	X
LearnIT	0000016427	Matt Murawski matt.murawski@learnit.com (415)946-6483 Jose Castro (415)946-6496	<a href="mailto:matt.murawski@learnit.com">matt.murawski@learnit.com</a>	1000012726													X	
NuSpective	0000014048	Bob Murtagh bmurtagh@nuspective.com (925)271- 7554	<a href="mailto:bmurtagh@nuspective.com">bmurtagh@nuspective.com</a>	1000012727		X	X		X						X			
Pantheon	0000037146	Elizabeth Robertson liz@pantheon.io (415)890-2167	<a href="mailto:liz@pantheon.io">liz@pantheon.io</a>	1000012728											X			
Staples	0000010525	Travis Massie travis.massie@staples.com (949)214-7003 Connie Peters Connie.peters@staples.com (954)379-5481	<a href="mailto:Travis.Massie@staples.com">Travis.Massie@staples.com</a> <a href="mailto:Connie.peters@staples.com">Connie.peters@staples.com</a>	1000012729			X	X	X			X		X				
Vox	0000008559	Tonja Marcus tmarcus@voxns.com (650)989-1054 John Romero jromero@voxns.com (650)989-1024	<a href="mailto:tmarcus@voxns.com">tmarcus@voxns.com</a> <a href="mailto:jromero@voxns.com">jromero@voxns.com</a>	1000012730		X									X			

**TIER 3**

Supplier	Supplier ID	Contact Person	Email for Solicitations	LBE Category	PeopleSoft Contract ID
Actnet Advanced Technology Corporation	0000026254	Julie Zhou, President julie@actnetonline.com (415)661-9000 Rachel Wang rachel@actnetonline.com	<a href="mailto:julie@actnetonline.com">julie@actnetonline.com</a> <a href="mailto:rachel@actnetonline.com">rachel@actnetonline.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012952
				GS093: Computer Systems Equipment Maintenance and Repair	1000012953
				GS109: Computer System Services	1000012954
				GS131: Computer Training Services	1000012955
Beta Nineties Computer, Inc.	0000024375	James Tang, GM jimt@beta90.com (415)974-1188	<a href="mailto:jimt@beta90.com">jimt@beta90.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012956
				GS093: Computer Systems Equipment Maintenance and Repair	1000012957
Diamond Technology, Inc.	0000021431	James Diamond, Director jdiamond@diamonddti.com (415)422-0073	<a href="mailto:jdiamond@diamonddti.com">jdiamond@diamonddti.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012958
				GS093: Computer Systems Equipment Maintenance and Repair	1000012959
				GS109: Computer System Services	1000012960
				GS132: Database Development and Analysis	1000013080
Exygy, Inc.	0000020358	Zack Berke, Managing Partner zach@exygy.com aashna.shah@exygy.com (415)992-7251 x201	<a href="mailto:zach@exygy.com">zach@exygy.com</a>	GS109: Computer System Services	1000012961
				GS131: Computer Training Services	1000012962
				GS132: Database Development and Analysis	1000012963
Farallon Geographics, Inc.	0000020303	Kathryn Olson, Controller kolson@fargeo.com (415)227-1140	<a href="mailto:kolson@fargeo.com">kolson@fargeo.com</a>	GS109: Computer System Services	1000012964
				GS132: Database Development and Analysis	1000012965
Five Paths, LLC	0000020121	J. Eric Leland, Partner eric@fivepaths.com (510)375-2396	<a href="mailto:eric@fivepaths.com">eric@fivepaths.com</a>	GS109: Computer System Services	1000012966
				GS131: Computer Training Services	1000012968
				GS132: Database Development and Analysis	1000012969
GenSigma LLC	0000033704	Vijay Thirumalai CEO & President vijayt@gensigma.com (650)248-5206	<a href="mailto:vijayt@gensigma.com">vijayt@gensigma.com</a>	GS093: Computer Systems Equipment Maintenance and Repair	1000012970
				GS132: Database Development and Analysis	1000012971
Parthex Tech, Inc.	0000027710	Jakshi Bharwad, CEO parthextech@gmail.com (650)868-6359	<a href="mailto:parthextech@gmail.com">parthextech@gmail.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012972
Spiral Scout, LLC	0000010624	John Griffin, CEO john@spiralscout.com (215)688-2751	<a href="mailto:john@spiralscout.com">john@spiralscout.com</a>	GS109: Computer System Services	1000012973
				GS132: Database Development and Analysis	1000012974
Studio 151	0000010311	Derek Slone, Project Engineer derek@studio151corp.com (650)477-6117 Troy Rutt troy@studio151corp.com	<a href="mailto:info@studio151corp.com">info@studio151corp.com</a> <a href="mailto:derek@studio151corp.com">derek@studio151corp.com</a> <a href="mailto:troy@studio151corp.com">troy@studio151corp.com</a>	GS093: Computer Systems Equipment Maintenance and Repair	1000012975

		(408)307-8658			
T&S Trading Co.	0000010057	Hok To, Manager hokhou@gmail.com (415)613-6698	<a href="mailto:hokhou@gmail.com">hokhou@gmail.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012976
				GS093: Computer Systems Equipment Maintenance and Repair	1000012977
				GS109: Computer System Services	1000012978
toptek micro center, Inc.	0000009339	Julian Lee, President julianlee@pacbell.net (415)250-1368	<a href="mailto:julianlee@pacbell.net">julianlee@pacbell.net</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012980
Two Rivers, Corp.	0000028618	Loretta Masters, Operations Manager lmasters@tworiverscorp.com (916)826-2334	<a href="mailto:lmasters@tworiverscorp.com">lmasters@tworiverscorp.com</a>	GS109: Computer System Services	1000012981
Xterra Solutions Inc.	0000008001	Jenny Ung, Operations Manager jung@xterrasolutions.com (415)844-9700	<a href="mailto:sales@xterrasolutions.com">sales@xterrasolutions.com</a> <a href="mailto:jung@xterrasolutions.com">jung@xterrasolutions.com</a>	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012982
				GS093: Computer Systems Equipment Maintenance and Repair	1000012983
				GS109: Computer System Services	1000012984

## Appendix D: OCA IT Team Contacts List

Name	Number	Email
Taraneh Moayed Assistant Director	415-554-6212	<a href="mailto:Taraneh.Moayed@sfgov.org">Taraneh.Moayed@sfgov.org</a>
Diane Handa Purchaser	415-554-6913	<a href="mailto:Diane.Handa@sfgov.org">Diane.Handa@sfgov.org</a>
Deborah Wells Purchaser	650-821-2864	<a href="mailto:deborah.wells@sfgov.org">deborah.wells@sfgov.org</a>
Victoria Falcon Purchaser	415-554-6734	<a href="mailto:Victoria.Falcon@sfgov.org">Victoria.Falcon@sfgov.org</a>
Norman Liang Purchaser	415-554-4639	<a href="mailto:Norman.Liang@sfgov.org">Norman.Liang@sfgov.org</a>
Jonathan Jew Purchaser	415-695-2193 (M T Th F) 415-554-6248 (W)	<a href="mailto:Jonathan.Jew@sfgov.org">Jonathan.Jew@sfgov.org</a>
Omar Sanchez Purchaser	415-695-2123	<a href="mailto:Omar.Sanchez@sfgov.org">Omar.Sanchez@sfgov.org</a>
Iliana Gonzalez Merino Assistant Purchaser	415-554-6736	<a href="mailto:Iliana.Gonzalezmerino@sfgov.org">Iliana.Gonzalezmerino@sfgov.org</a>