



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 either:

1) The City and County of San Francisco’s Department of Technology (“DT”) in accordance with the [DT CIO Review Policy & Procedures](#) and/or [Cybersecurity Risk Assessment](#); and/or

2) The Committee on Information Technology (“COIT”) for [Chapter 19B Surveillance Technology review](#).

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

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:


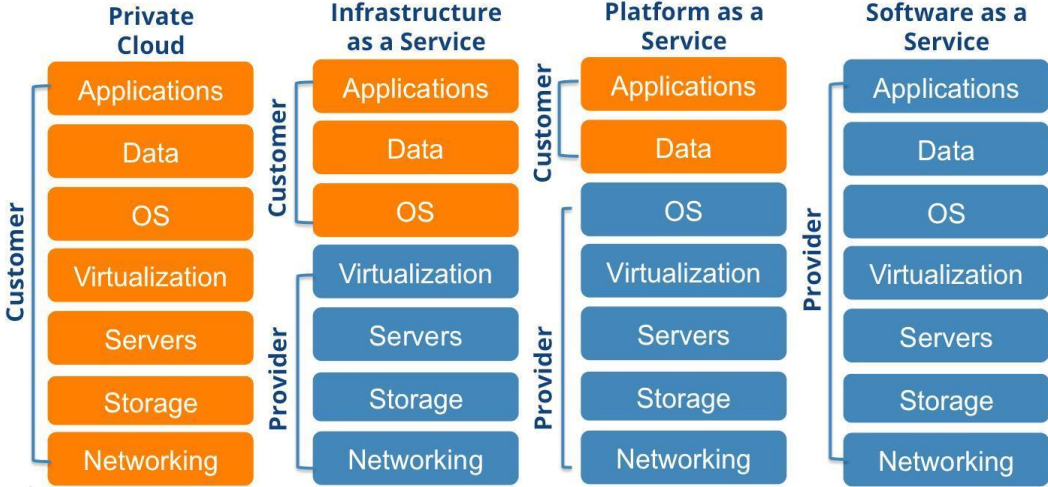
- **DT-IT** 102726 STG MAINT RENEWAL
- **HSA-IT** QTS Maintenance

NIGP Codes for All Technology Purchases and Recommended Account Codes

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

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>On Premise / Private Cloud</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>Non-Private Cloud Computing</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>Cloud Computing Models:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Software as a Service (SaaS) <input type="checkbox"/> Infrastructure as a Service (IaaS) <input type="checkbox"/> Platform as a Service (PaaS) <input type="checkbox"/> Desktop as a Service (DaaS) <input type="checkbox"/> Backend as a Service (BaaS) <input type="checkbox"/> IT as a Service (ITaaS) <p>On Premise v. Cloud: Examples of Who Controls What?</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 [Cybersecurity 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

Cybersecurity Risk Assessment

Cybersecurity Risk Assessment

Cyber Risk Categories: The following technology services represent additional cybersecurity risk to the City:

1. **Any contract (Technology and Non Technology) with access to Level 3-5 data:**
Contractors that have access to and/or store Level 3-5 City data on their systems during the performance of the contract. Level 3-5 data includes sensitive and compliance related data, such as HIPAA, CJIS, and IRS data. Please refer to COIT data classification standard: <https://sfcoit.org/datastandard>.
2. **Cloud Services:** This includes all forms of cloud computing, including but not limited to: Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (IaaS).
3. **Operational Technology Systems.** Operational technology or OT is a category of computing and communication systems used to manage, monitor and control industrial operations with a focus on the physical devices and processes they use. OT is the hardware and software that keeps such things as factories, power plants, building, facility equipment etc. running.
4. **Technical Services that Enable Access to City Systems:** These include all instances where a non-City employee is given access of any kind to City networks or systems (e.g., IT support, software installation, etc.).

Cybersecurity Risk Assessment Timing: For each technology that qualifies for one or more of the above-named categories, City departments are required to perform Cybersecurity Risk Assessment (CRA) at the following stages of the procurement process:

1. Where a solicitation is not being conducted, prior to requesting permission from OCA to waive or alter solicitation requirements; or
2. Where a solicitation is being conducted, during the evaluation of all responsive proposals or bids being considered.

Prime Contractors and Resellers: Where the technology and/or technical services are procured through a prime contractor or reseller, CRA must be performed for the entity(ies) responsible for manufacturing the product, performing the technical functions related to the product's performance, and/or accessing City's networks and systems. In some instances where the prime contractor or reseller plays an active role in each of these activities, CRA shall also be required for the prime contractor or reseller.

CRA Reports: To conduct a CRA, the department must collect as part of its solicitation process (or, where there is no solicitation process, upon requesting a quote) one of the following two reports:

1. **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy (management's description of a service organization's system and the suitability of the design and operating effectiveness of controls, aka SOC-2 Type 2); or

2. **City Risk Assessment Questionnaire:** City Cybersecurity Risk Assessment Report based on Consensus Assessments Initiative Questionnaire.

The above reports will be evaluated by the soliciting department and DT to identify existing or potential cyber risks to City which shall be remediated on or before contract execution, but in no event later than 180 days from contract execution (unless otherwise agreed to by City). Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews. For additional guidance regarding this process, please visit [Vendor Risk Management](#).

Chapter 19B

Surveillance

Technology

Assessment

Chapter 19B Surveillance Technology

Assessment

Chapter 19B of the Administrative Code defines “Surveillance Technology” as any technology used to collect information on any individual or group. However, there are 15 exemptions. Where an exemption does not apply, departments must develop a policy related to the use of the technology prior to contract execution and certification. To determine if your technology purchase is a Surveillance Technology, subject to any exemptions, and/or if a policy is required, you must submit a request to COIT via ServiceNow.

To learn more, visit:

- [Chapter 19B Surveillance Technology Test](#)
- [Chapter 19B Surveillance Technology Ordinance Overview](#)

Documentation for Submitting a Contract or Requisition to OCA:

If your technology has a surveillance component, you must provide the following documentation with your Contract (if contracting directly with a manufacturer or service provider) or Requisition request (if using the Technology Marketplace):

- 1) Completed Chapter 19B Surveillance Technology Test using ServiceNow *showing the technology is exempt from Chapter 19B*; or
- 2) Completed Chapter 19B Surveillance Technology Test using ServiceNow *showing the technology is not exempt from Chapter 19B but the department has a Board of Supervisor approved policy for the technology.*

DT CIO Review

DT CIO Review and Assessment

Technology goods or services include computers, hardware, software systems, software maintenance, software services, cloud services, 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. Where the solicitation involves the purchase of technology related goods and services, DT CIO approval will be required prior to contract certification and execution. Deviations from the City technology standards will require justification before DT CIO approval is granted. **However, Departments are encouraged to communicate with DT prior to commencing the solicitation process to ensure DT has adequate input where required.** To learn more, visit: <https://sfgov.org/oca/technology-purchasing-overview>.

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.

Documentation for Submitting a Contract or Requisition to OCA:

If your technology is subject to DT CIO review or CRA, you must provide the ServiceNow ID associated with your approved purchase and/or copy of DT's approval obtained through ServiceNow.

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 (Public Solicitation/Direct Contracting) and 3 (Using the City's Technology Marketplace) 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. If your software is included in one of these EAs, you must use them unless a valid reason exists to not use them.

- **DT's EAs can be found here:** [EA contracts](#). Contact 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: Public Solicitation/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 (discussed below under Option 3). 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.

When using this option, ensure you follow the processes for Public Solicitation/Direct Contracting by referring to the Checklists & Templates found on [OCA's website](#).

Option 3: The City's Technology Marketplace Pool of Prequalified Resellers (Preferred Method)

The City's Technology Marketplace Pool consists of 50+ 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. 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](#)

Comparison: Technology Marketplace Process v. Public Solicitation/Direct Contracting

	Technology Marketplace Term Contracts	Public Solicitation/Direct Contracting
Duration	1-4 weeks	4 + months
OK to Name Manufacturer?	Yes. However, cannot name potential subcontractors when professional services are involved.	No. Provide specs or make formal request to OCA for a "No Substitute".
Purchasing Method	<ul style="list-style-type: none"> • Requisition to Purchase Order 	<ul style="list-style-type: none"> • Multi-year contract: Once contract has been approved, Department issues POs against it. City Contract Templates are available HERE. • Requisition to PO not acceptable: Standalone Requisition to PO may be permitted for hardware purchases <u>w/out</u> software licensing and/or maintenance. <i>Contact OCA for approval prior to submitting a Requisition.</i>
Technology Offerings Available for Purchase	Cloud transactions with Level 3 data security risks or higher not permitted except with limited exceptions.	All products and services.
Transaction Limits?	Yes. See Technology Marketplace section of this Guidebook for details.	No.
Competitive Solicitation Thresholds and Methods	<p>Varies by Tier. See Technology Marketplace section of this Guidebook for details.</p> <p>-----</p> <p>No Solicitation Waiver Requests: Departments may not request to waive solicitation requirements.</p>	<p>≤ \$10K: Solicitation not required</p> <p>-----</p> <p>> \$10K:</p> <ul style="list-style-type: none"> • Commodities/Low Bids: Bid out by OCA • Services or Commodities mixed with Services: RFP by Dept <p>-----</p> <p>Solicitation Waiver Request: Departments. may request to waive solicitation requirements.</p> <ul style="list-style-type: none"> • https://sfgov.org/oca/requests-waive-solicitation-requirements
Solicitation Audience	Must choose from one of three Technology Marketplace Tiers of resellers. Cannot mix Tiers.	<ul style="list-style-type: none"> • All possible suppliers. • Supplier must possess City Supplier ID, Valid Business Tax License and be 12B Compliant. (12B Exception: "21.30" Software Licenses/Maintenance purchases under \$10MM).
Civil Service Approval (Professional Services Only)	Not required. Submit request to Local 21 . If there are no objections after 10 days, the purchase is deemed approved.	Required. <ul style="list-style-type: none"> • ≤ \$100K: Expedited 7 day review • > \$100K: Min. 30 days for union review and then full commission hearing.
Other City Agency Approvals	<ul style="list-style-type: none"> • CMD: Forms 2A and 2B if Professional Services over \$129K. • Cybersecurity Risk Assessment. • Chapter 19B Surveillance Technology Assessment. • DT CIO Review and Assessment. 	<ul style="list-style-type: none"> • Multiple agencies (Refer to applicable OCA checklist) • Cybersecurity Risk Assessment. • Chapter 19B Surveillance Technology Assessment. • DT CIO Review and Assessment.

Using the City's Technology Marketplace Suppliers

Using the City's Technology Marketplace Suppliers

Evolution of the Technology Marketplace



The City's Technology Marketplace originated in the 1990's as an efficient purchasing model for the City's technology needs. It reduces the time required to complete a transaction from several months to 1-2 weeks. Through continuous process improvements, it now consists of 50+ suppliers.

Current Technology Marketplace Structure

The City's current Technology Marketplace consists of 50+ 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 solicitation for each transaction. The suppliers are broken down into three Tiers:

	Tier 1	Tier 2	Tier 3
Technology Offerings Available for Purchase	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>
Transaction Limits	<ul style="list-style-type: none"> • Commodities: \$2.5M • Services: \$2.5M 	<ul style="list-style-type: none"> • Commodities: \$2.5M • Services: \$2.5M 	<ul style="list-style-type: none"> • Commodities: \$129K • Services: \$600K
Competitive Solicitation Thresholds	<p>≤ \$25K: Bid not required.</p> <p>> \$25K:</p> <ul style="list-style-type: none"> ○ Commodities/Low Bid: Bid out by OCA. ○ Services (or Commodities mixed with Services): RFP by Dept. 	<p>≤ \$25K: Bid not required.</p> <p>> \$25K:</p> <ul style="list-style-type: none"> ○ Commodities/Low Bid: Bid out by OCA. ○ Services (or Commodities mixed with Services): RFP by Dept. 	<p>< 129K: Bid not required.</p> <p>≥ \$129K:</p> <ul style="list-style-type: none"> ○ Commodities/Low Bid: N/A ○ Services (or Commodities mixed with Services): RFP by Dept.

To use the Technology Marketplace, Departments submit a Requisition in PeopleSoft for OCA review. Once approved, a purchase through the Technology Marketplace results in a Purchase Order issued by OCA 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.










Departments cannot sign any agreements, but must abide by the manufacturer's license, use and support terms. All other matters are governed by the Term Contract between the Technology Marketplace reseller and City.

Funding Considerations

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.

Technology Marketplace Checklists and Reseller Information:

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](#)
- Technology Marketplace Catalogue ( [Technology Marketplace Catalogue.pdf](#))
- Technology Marketplace Suppliers Contact Information ( [TM Contact Information- Tier 123.xlsx](#))
- Technology Marketplace RFP Template and Attachments:
 - TM P-696 (04-21): Technology Marketplace RFP Template ([TM P-696 \(4-21\) - RFP Template](#))
 - Attachment 1 - Technology Marketplace Term Sheets for  [Tier 1 Term Sheets.pdf](#) and  [Tiers 2 and 3 Term Sheets.pdf](#)
 - Attachment 2 - CMD Forms 2A and 2B ( [CMD Forms 2A and 2B](#))
 - Attachment 3 - TM Quote Template for Professional Services and Commodities ( [Technology Marketplace Quote 1-14-21](#))
 - Attachment 4 - City-Created Price Proposal Template ( [City Created Price Proposal Template](#))
 - Panelist Impartiality & Confidentiality Statement ( [Panelist Impartiality & Confidentiality Statement](#))
 - Solicitation Addendum Template ( [Solicitation Addendum Template](#))
 - Solicitation Q&A Template ( [Solicitation Q&A Template](#))
 - Notice of Intent to Award (Proposals) Template ( [Notice of Intent to Award \(Proposals\) Template](#))
 - [Creating Sourcing Events and Bid Advertisements in PeopleSoft](#)

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.

Commodities Solicitation Thresholds	<table border="1"> <thead> <tr> <th style="color: green;">Tier 1</th> <th style="color: green;">Tier 2</th> <th style="color: green;">Tier 3</th> </tr> </thead> <tbody> <tr> <td> ≤ \$25K: Bid not required > \$25K: Bid out by OCA. </td> <td> ≤ \$25K: Bid not required > \$25K: Bid out by OCA. </td> <td> < \$129K: Bid not required ≥ \$129K: N/A because 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 because PO for Commodities cannot exceed \$129K.
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 because PO for Commodities cannot exceed \$129K.					
Solicitation Documents	<p>(1) Quote:</p> <p>If No Solicitation Required:</p> <ul style="list-style-type: none"> Upload quote from any TM supplier authorized to sell the goods. <p>If Solicitation Required:</p> <ul style="list-style-type: none"> Upload quote from TM supplier or Manufacturer for OCA to use to bid out. Quote must include <i>universal part numbers</i> and descriptions. If applicable, ensure the department’s <i>account details</i> (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. <p>(2) Manufacturer terms related to use of license/support: 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"> Upload manufacturer use/support terms into PS or provide the link in your requisition. 						
DT and COIT Review Documents	<p>(3) DT CIO Review + Cybersecurity Risk Assessment + Surveillance Technology Assessment: Refer to this Guidebook’s Cybersecurity Risk Assessment, Chapter 19B Surveillance Technology Assessment, and DT CIO Review and Assessment to determine which of these are applicable.</p> <ul style="list-style-type: none"> Upload documentation of approvals into PeopleSoft. 						
Requisition Details <i>You must provide this information In addition to completing all required requisition fields.</i>	<p>(4) Category Codes:</p> <p>A. For each line item, select the appropriate and correct Category Code.</p> <p>(5) In the Requisition “Comments and Attachments” field, provide:</p> <p>A. Shipping Information, including Contact Name and Email. <i>Required even if no physical delivery.</i></p> <p>B. Billing Information, including Contact Name and Email</p> <p>C. License Registration Email, if purchasing software or SW/HW support</p> <p>(6) In the Requisition “Approval Justification” field, answer each question below:</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 “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.</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
	≤ \$25K: Bid not required > \$25K: Bid out by Dept.	≤ \$25K: Bid not required > \$25K: Bid out by Dept.	< \$129K: Bid not required ≥ \$129K: Bid out by Dept.
Solicitation Documents	<p>(1) Solicitation Documents:</p> <p>If No Solicitation Required:</p> <ul style="list-style-type: none"> Upload quote and Scope of Work (SOW) from any TM supplier authorized to sell the services. <p>If Solicitation Required:</p> <ul style="list-style-type: none"> Conduct solicitation at department level through Peoplesoft and upload each file below separately, using the naming convention below: <ol style="list-style-type: none"> Proposal evaluation Selected Quote Selected SOW Notice of Intent to Award to all TM Suppliers in the solicited Tier. <p>(2) Manufacturer terms related to use of license/support: 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"> Upload manufacturer use/support terms, if applicable, into PS or provide the link in your requisition 		
DT and COIT Review Documents	<p>(3) DT CIO Review + Cybersecurity Risk Assessment + Surveillance Technology Assessment: Refer to this Guidebook's Cybersecurity Risk Assessment, Chapter 19B, Surveillance Technology Assessment, and DT CIO Review & Assessment to determine which of these are applicable.</p> <ul style="list-style-type: none"> Upload documentation of approvals into PeopleSoft. Approved amount must equal estimated project spend, regardless of initial PO amount. 		
Local 21 Documents	<p>(4) Local 21 Review: Local 21 Review is required for <u>all</u> professional services requests. Submit request to Local 21 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"> Upload L21 Confirmation Email into PeopleSoft as proof of Local 21 submission. Approved amount must equal estimated project spend, regardless of initial PO amount. 		
CMD Documents	<p>(5) CMD Forms 2A and 2B + Approval email from CMD: CMD Forms 2A & 2B approval is required for professional services over \$129,000. Request forms from Proposer and submit them to CMD (currently Selormey Dzikunu), along with the SOW and Quote, for approval.</p> <ul style="list-style-type: none"> Upload CMD Email Approval into PeopleSoft as proof of CMD approval. Approved amount must equal estimated project spend, regardless of initial PO amount. 		

<p>Requisition Details</p> <p><i>You must provide this information in addition to completing all required requisition fields</i></p>	<p>(6) Category Codes: For each line item, select the appropriate and correct Category Code.</p> <p>(7) In the Requisition “Comments and Attachments” field, provide:</p> <p>A. Shipping Information. Include Contact Name and Email. <i>Required even if no physical delivery.</i></p> <p>B. Billing Information. Include Contact Name and Email.</p> <p>C. License Registration Email, if purchasing software or SW/HW support.</p> <p>(8) In the Requisition “Approval Justification” field, answer each question below:</p> <p>A. What are you buying and why?</p> <p>B. What is the Sourcing Event number for this solicitation?</p> <p>C. What is the <u>total</u> estimated project spend?</p> <ul style="list-style-type: none"> • The total estimated project amount must have <u>a justifiable correlation</u> to the RFP and/or Proposal. • You may only exceed the stated total estimated project amount by 20%. <p>D. Will you be funding this project upfront in full or through change orders?</p> <p>E. Did the IT Director of your Department approve?</p> <p>F. Does this transaction result in data being hosted in the cloud?</p> <p>G. 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.</p>
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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	MBEprogram@ccsglobaltech.com Gov@ccsglobaltech.com dlangdon@ccsglobaltech.com mkhalaghi@ccsglobaltech.com	1000012601	X											X	X
CDW Government	0000023205	Alex Picchietti ccsf@cdwg.com (877)707-7850 Jason Schwartz JasonS@cdwg.com (847)419-7542 TJ Isselhard Tj.isselhard@cdw.com 312-547-4810 ext: 54810	ccsf@cdwg.com JasonS@cdw.com tj.isselhard@cdw.com	1000012602		X	X	X	X	X	X	X	X	X	X	X	X
Central Computers	0000023129	Chester Yeung chester@centralcomputer.com (415)495-5888 x8122	sfgov@centralcomputer.com chester@centralcomputer.com	1000012603		X	X	X	X	X	X	X	X	X	X		X
ComputerLand	0000022410	Cathy Souza csouza@cland.com (408)519-3230	sfgovsales@cland.com csouza@cland.com	1000012604	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	aeisenberg@convergeone.com ; JVillafana@convergeone.com ;	1000012605	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	dlawson@cornerstoneconcilium.com tdu@cornerstoneconcilium.com epitts@ssp.com sandesh@ssp.com nhodges@ssp.com	1000012606	X	X	X	X	X	X	X		X	X	X	X	X
DPP Tech	0000020897	Puran Moorjani pm@dpptech.com (925)914-7000	pm@dpptech.com	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	CCSF@dynamicssystemsinc.com	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	ccsfquotes@pem.com kperez@enpointe.com	1000012609	X	X	X	X	X	X	X	X	X	X	X	X	X
Insight Public Sector Inc	0000040338	Kathy Perez kathy.perez@Insight.com 310-337-6127	ccsfquotes@insight.com Kathy.perez@insight.com Mark.marcelo@insight.com Edcarlo.padolina@insight.com Katheleen.jackson@insight.com	1000018903													
Intervision	0000030163	Sarah Fletcher Sarah.Fletcher@intervision.com (408)567-4259 Ted Callagy ted.callagy@intervision.com	ted.callagy@intervision.com	1000012610	X	X	X		X		X		X	X	X		X
Presidio Networked Solutions	0000012909	Dan Ornelas dornelas@presidio.com (415)501-9011	dornelas@presidio.com	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	techmarket@roberthalf.com christine.vo@rht.com jeff.Reinders@roberthalf.com	1000012612	X							X					X
Slalom	0000010886	Eli Hill elih@slalom.com (650)305-0807 John Pavel john.pavel@slalom.com (415)593-3450	elih@slalom.com	1000012613	X												
Softnet Solutions	0000010802	John Galluccio johng@softnets.com (408)542-0888	johng@softnets.com	1000012614			X	X	X	X		X			X		X
Stellar Services	0000010447	Chris Donohue cdonohue@stellarservices.com (505)660-9889	cdonohue@stellarservices.com	1000012615												X	X
Variedy	0000037842	Alex Dang adang@variedy.com (949)610-4232	adang@variedy.com	1000012616	X												
World Wide Technology	0000008050	Carol Harting carol.harting@wwt.com (636)751-8399 Daniel Hopkins daniel.hopkins@wwt.com (925)366-1665	carol.harting@wwt.com ccsf@wwt.com daniel.hopkins@wwt.com	1000012617		X	X	X		X	X	X	X	X		X	X

TIER 1 (continued)

TIER 1 (continued)					PRODUCTS										SERVICES				
Xtech JV	000008003	John Eaton jeaton@eatonassoc.com (415)282-1188 x233 Brad Baker brad.baker@21tech.com	Sales@XtechJV.com Sales@21tech.com Xtech@eatonassoc.com brad.baker@21tech.com jeaton@eatonassoc.com	1000012618	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Zones	0000038064	Kenneth Mollison kenneth.mollison@zones.com (916)549-4474	SF@zones.com Kenneth.Mollison@zones.com Saad.Bhatti@zones.com	1000012619	X	X	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	Herrick@ameritechcomputer.com	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	Byron.ling@bridgemicro.net	1000012722		X	X	X	X	X			X	X	X				
Delta Computer Solutions	0000021575	Steve Ike Account Manager sike@deltacs.com (415)519-4063	sike@deltacs.com	1000012723												X	X	X	
Elyon	0000032448	Karen Morphy karenmorphy@elyonstrategies.com (916)652-7789	karenmorphy@elyonstrategies.com	1000012724											X		X	X	
Ipso Facto	0000018143	Jeff Stauffer jeff@ipsofacto.net (415)362-2922	jeff@ipsofacto.net	1000012725			X				X		X	X	X	X	X	X	
LearnIT	0000016427	Matt Murawski matt.murawski@learnit.com (415)946-6483 Jose Castro (415)946-6496	matt.murawski@learnit.com	1000012726													X		
NuSpective	0000014048	Bob Murtagh bmurtagh@nuspective.com (925)271- 7554	bmurtagh@nuspective.com	1000012727		X	X		X						X				
Pantheon	0000037146	Elizabeth Robertson liz@pantheon.io (415)890-2167	liz@pantheon.io	1000012728											X				
Staples	0000010525	Travis Massie travis.massie@staples.com (949) 214-7003 Mark Homen mark.homen@staples.com (510)608-6964 Jen Graham jen.graham@staples.com (510)608-6930	travis.massie@staples.com mark.homen@staples.com jen.graham@staples.com	1000012729			X	X	X				X		X				
Vox	0000008559	Tonja Marcus tmarcus@voxns.com (650)989-1054 John Ferguson jferguson@voxns.com	tmarcus@voxns.com jferguson@voxns.com	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	julie@actnetonline.com rachel@actnetonline.com	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
Apis Technology, LLC	0000040885	Sean Osterday sean@apistech.com 530-417-4210	orders@apistech.com sean@apistech.com	GS109: Computer System Services	1000018696
				GS132: Database Development and Analysis	1000018697
Beta Nineties Computer, Inc.	0000024375	James Tang, GM jimt@beta90.com (415)974-1188	jimt@beta90.com	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012956
				GS093: Computer Systems Equipment Maintenance and Repair	1000012957
C M Pros	0000023789	Samir Messiah Sam.messiah@cmprosinc.com 415-437-0701	Sam.messiah@cmprosinc.com	GS131: Computer Training Services	1000018701
Capital Partnerships Inc.	0000023415	Davis Schwartz cpidave90@gmail.com 415-377-0274	cpidave90@gmail.com	GS109: Computer System Services	1000018698
				GS131: Computer Training Services	1000018699
Diamond Technology, Inc.	0000021431	James Diamond, Director jdiamond@diamonddti.com (415)422-0073	jdiamond@diamonddti.com	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	zach@exygy.com	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	kolson@fargeo.com	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	eric@fivepaths.com	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	vijayt@gensigma.com	GS093: Computer Systems Equipment Maintenance and Repair	1000012970
				GS132: Database Development and Analysis	1000012971

TIER 3 (continued)				LBE Category	PeopleSoft Contract ID
Geosphere LLC	0000041907	Sergey Litvinenko serge@batg.net (415) 571-7002	serge@batg.net	GS093: Computer Systems Equipment Maintenance and Repair	1000018703
				GS109: Computer System Services	1000018704
				GS132: Database Development and Analysis	1000018705
InnoActive Group	0000039217	Michael Guardamagni michael@innoactivegroup.com 925-207-2676 Sean Wahidi swahidi@innoactivegroup.com	michael@innoactivegroup.com swahidi@innoactivegroup.com	GS109: Computer System Services	1000018706
Meadow Design Inc.	0000015428	Marco Contreras mcontreras@meadow.cc 415 550 0744 x13	mcontreras@meadow.cc	GS132: Database Development and Analysis	1000018707
Parthex Tech, Inc.	0000027710	Jakshi Bharwad, CEO parthextech@gmail.com (650)868-6359	parthextech@gmail.com	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012972
Spiral Scout, LLC	0000010624	John Griffin, CEO john@spiralscout.com (215)688-2751	john@spiralscout.com	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 (408)307-8658	info@studio151corp.com derek@studio151corp.com troy@studio151corp.com	GS093: Computer Systems Equipment Maintenance and Repair	1000012975
Systems Integration Resources, Inc.	0000037833	Sylvia Ramos-Hans sylvia.ramos@systemsir.com 415-747-4185 Steven Hans steve.hans@systemsir.com	sylvia.ramos@systemsir.com steve.hans@systemsir.com	GS109: Computer System Services	1000018708
				GS132: Database Development and Analysis	1000018709
T&S Trading Co.	0000010057	Hok To, Manager hokhou@gmail.com (415)613-6698	hokhou@gmail.com	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012976
				GS093: Computer Systems Equipment Maintenance and Repair	1000012977
				GS109: Computer System Services	1000012978
TeamWorks Consultancy LLC	0000030006	Vijay Yegalapati Vijay.Yegalapati@twconsultancy.com 510-566-5189	Vijay.Yegalapati@twconsultancy.com	GS109: Computer System Services	1000018710
				GS131: Computer Training Services	1000018712
The Thier Group LLC	0000009591	Hollie P. Thier hollithier@gmail.com 415-407-4843	hollithier@gmail.com	GS131: Computer Training Services	1000018713
				GS132: Database Development and Analysis	1000018714

TIER 3 (continued)				LBE Category	PeopleSoft Contract ID
Toptek micro center, Inc.	0000009339	Julian Lee, President julianlee@pacbell.net (415)250-1368	julianlee@pacbell.net	EQ108: Computer Hardware, Software and Peripheral Equipment	1000012980
Two Rivers, Corp.	0000028618	Loretta Masters, Operations Manager lmasters@tworiverscorp.com (916)826-2334	lmasters@tworiverscorp.com	GS109: Computer System Services	1000012981
Westland Management Solutions, Inc.	0000008263	Laurie Mansur lmansur@westlandsolutions.com 925-595-5834 Scott Vosburg 916-257-1844 svosburg@westlandsolutions.com	lmansur@westlandsolutions.com svosburg@westlandsolutions.com	GS109: Computer System Services	1000018716
				GS132: Database Development and Analysis	1000018717
Xterra Solutions Inc.	0000008001	Jenny Ung, Operations Manager jung@xterrasolutions.com (415)844-9700	sales@xterrasolutions.com jung@xterrasolutions.com	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	Taraneh.Moayed@sfgov.org
Jonathan Jew IT Purchasing Supervisor	415-695-2193	Jonathan.Jew@sfgov.org
Deborah Wells Purchaser	650-821-2864	Deborah.Wells@sfgov.org
Victoria Falcon Purchaser	415-554-6734	Victoria.Falcon@sfgov.org
Norman Liang Purchaser	415-554-4639	Norman.Liang@sfgov.org
Carmen Omran Purchaser	415-554-4578	Carmen.Omran@sfgov.org
Iliana Gonzalez Merino Assistant Purchaser	415-554-6736	Iliana.GonzalezMerino@sfgov.org