

Checklists for Purchasing Commodities and Services through the Technology Marketplace (1/30/20)

These checklists apply ONLY to purchases made through the City's Technology Marketplace resellers with whom OCA has existing contracts. Go to <https://sfgov.org/oca/resources> to download the most recent version of the Quote templates used in the City's Technology Marketplace.

Do not use these checklists for Public Solicitations or 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 Public Purchasing and Contracting Requirements which can be found at <https://sfgov.org/oca/resources>.

Technology Marketplace Checklist for 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 data-bbox="289 268 646 306">Tier 1</th> <th data-bbox="646 268 1024 306">Tier 2</th> <th data-bbox="1024 268 1549 306">Tier 3</th> </tr> </thead> <tbody> <tr> <td data-bbox="289 306 646 426"> ≤ \$25K: Bid not required > \$25K: Bid out by OCA. </td> <td data-bbox="646 306 1024 426"> ≤ \$25K: Bid not required > \$25K: Bid out by OCA. </td> <td data-bbox="1024 306 1549 426"> ≤ \$129K: Bid not required > \$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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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 universal part numbers and descriptions. If applicable, ensure the department's account details (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 Review Documents	<p>(3) DT CIO Review: Refer to DT CIO Review Policy & Procedures to determine if DT review is required. Using DT's Service Now platform, submit your request to DT for approval.</p> <ul style="list-style-type: none"> Upload approved DT CIO request email into PeopleSoft as proof of DT CIO approval. 						
Requisition Details <p><i>You must provide this information in addition to completing all required requisition fields.</i></p>	<p>(4) Category Codes:</p> <p>A. For each line item, select the appropriate and correct Category Code.</p> <p>(5) In the Requisition "<u>Comments and Attachments</u>" field, provide:</p> <p>B. Shipping Information, including Contact Name and Email. <i>Required even if no physical delivery.</i></p> <p>C. Billing Information, including Contact Name and Email</p> <p>D. License Registration Email, if purchasing software or SW/HW support</p> <p>(6) In the Requisition "<u>Approval Justification</u>" 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>						

Technology Marketplace Checklist for Services

Do not use for Public Solicitations to Non Technology Marketplace Resellers

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: 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 and upload each file below separately, using the naming convention below: <ol style="list-style-type: none"> RFP PDF copy of email notifying all authorized resellers in selected tier of the RFP Combined file containing all proposals received Proposal evaluation Selected Quote Selected SOW <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 Review Documents	<p>(3) DT CIO Review: DT CIO Review is required for <u>all</u> professional services requests (exception: IT Training services). Using DT's Service Now platform, submit your request to DT for approval.</p> <ul style="list-style-type: none"> Upload approved DT CIO request email into PeopleSoft as proof of DT CIO approval. 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. 		

**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.