

November 2018

CMAS Application

(This version supersedes all previous CMAS applications)

- Contains Links to Overview of the CMAS Program & FAQs
- Contains CMAS Application (Offer) & Instructions
- Call CMAS Unit for Information (916) 375-4365
- Contact CMAS Unit at cmas@dgs.ca.gov
- CMAS Website: www.dgs.ca.gov/pd/Programs/Leveraged/CMAS.aspx



Procurement Division · Department of General Services
State of California

CMAS APPLICATION

Table of Contents	Page
Section 1 - Introduction	3
Section 2 – CMAS Application	5
Section 3 – Instructions for Completing Application	8
Attachment A: CMAS Contractor Certification	12
Attachment B: Not Specifically Priced (NSP) Provision	13
Attachment C: Customer References Form & Instructions	15
Attachment D: Darfur Contracting Act Certification & Instructions	19
Attachment E: Checklist	21

CMAS APPLICATION

SECTION 1 – INTRODUCTION

Before You Get Started

For a brief overview of the California Multiple Award Schedule (CMAS) Program, including a list of some products and services not available through the CMAS Program, click on the [Overview of the CMAS Program](#).

For a listing of Frequently Asked Questions (FAQs) about completing this CMAS Application, click on the [FAQs Regarding the CMAS Application](#).

Steps for Completing this Application

The following steps apply to an application for either a new or renewal CMAS:

- Step 1: Find a base Federal GSA schedule.
 - Step 2: Read the instructions for completing this application.
 - Step 3: Complete your CMAS Application.
 - Step 4: Submit your CMAS Application.
-

Incomplete Submittals

All required documents must be submitted with a CMAS Application, as incomplete submittals may be returned unprocessed.

STEP 1 – FIND A BASE FEDERAL GSA SCHEDULE

Find a Base GSA Schedule

The first step in completing a CMAS Application is to find a base Federal GSA schedule that contains the products, services and prices you want to offer. This base Federal GSA schedule can be held either by your company or by another company. A separate CMAS Application must be submitted for each base GSA schedule offered. To search for a Federal GSA schedule, select the link: www.gsaelibrary.gsa.gov

GSA Requirements

To access a document providing the CMAS requirements for base GSA schedules and a listing of some unacceptable GSA schedules, click on [CMAS Requirements for GSA Schedules](#).

A complete GSA schedule consists of the following components:

- Cover Page
 - Ordering Instructions
 - Terms & Conditions
 - Product Descriptions
 - Service Descriptions
-

Continued on next page

CMAS APPLICATION

SECTION 1 – INTRODUCTION, CONTINUED

STEP 2 – READ THE INSTRUCTIONS FOR COMPLETING THIS APPLICATION

Read the Instructions In order to accurately complete this CMAS Application, you must first read the instructions for each field on the application. Complete all applicable fields of the application.

STEP 3 – COMPLETE YOUR CMAS APPLICATION

Application By signing the CMAS Application, your firm is making a legal, binding offer for a CMAS to provide products and/or service to the State of California.

Separate Application A separate CMAS Application must be submitted for each base GSA schedule offered.

Checklist Attachment E-Checklist contains a list of items to be included with the CMAS Application.

STEP 4 – SUBMIT YOUR CMAS APPLICATION

Where to Send Your Application Mail your CMAS Application to:

California Department of General Services
Procurement Division – CMAS Unit
Attention – Application Processing
PO Box 989052, MS # 2-202
West Sacramento, CA 95798-9052

Or you may hand deliver your CMAS Application to:

California Department of General Services
Procurement Division – CMAS Unit
Attention – Application Processing
707 Third Street, 2nd Floor, MS # 2-202
West Sacramento, CA 95605-2811

Faxed or emailed applications are not accepted.

CMAS APPLICATION

SECTION 2 – CMAS APPLICATION

INSTRUCTIONS FOR COMPLETING THIS APPLICATION START ON PAGE 8

1. Company making CMAS offer:

Company Name

DBA Name (if applicable)

Previous CMAS Company Name (if applicable)

Street Address (No P.O. Box)

City, State, Zip Code

2. **Fictitious business name** (dba as shown in #1)
(check if applicable and include required document)

3. **New or renewal CMAS** (check only one box)

- This application is for a new CMAS.
- This application is to renew our existing CMAS:

CMAS Schedule No.: _____

4. Contact: Questions on resulting schedule

Contact Name

Extension:

Phone Number (and extension if applicable)

Fax Number (if applicable)

Email Address

Street Address or P.O. Box (If different from #1)

City, State, Zip Code (If different from #1)

5. Contact: Questions regarding application

(check only one box)

- The same contact person shown in #4.
- The contact person from this company named below:

Contact Name

Extension:

Phone Number (and extension if applicable)

Fax Number (if applicable)

Email Address

6. Contact: Authorized consulting firm

Company Name

Contact Name

Extension:

Phone Number (and extension if applicable)

Email Address

7. Address where Purchase Orders are sent:

Company Name

Street Address (No P.O. Box)

City, State, Zip Code

Fax Number (if applicable)

Attention

Email Address (if applicable)

8. CMAS California Terms & Conditions

This company accepts the **current** CMAS State of California Terms & Conditions, without exceptions.
(check only one box)

- Information Technology Goods & Services
- Non-Information Technology Goods
- Non-Information Technology Services

9. Payee Data Record (Std. 204) enclosed

(check box and include Payee Data Record)

10. Secretary of State (SOS) registration

(check only one box)

- SOS screen print or certificate included (Corp, LLC, LLP, LP)

SOS Entity No.: _____

- SOS registration not required (Sole Proprietor or Partnership)

11. California Seller's Permit

(check if applicable and provide permit number)

California Seller's Permit No.: _____

CMAS APPLICATION

SECTION 2 – CMAS APPLICATION, CONTINUED

12. California Contractor’s License

(check if applicable and provide license number)

California Contractor’s License no.: _____

13. Company’s business status

(check applicable boxes)

- California SB Certification No.: _____
- California DVBE Certification No.: _____
- Uncertified SB (will be shown as a large business)
- Large Business

14. Not Specifically Priced (NSP) provision requested *(check if applicable)*

15. Resellers on CMAS requested *(check if applicable and include required information)*

16. CMAS Product & Service Codes included *(check box and include pages containing selected codes)*

17. CAL-Card is accepted *(check if applicable)*

18. Customer References, Attachment C

(check only one box)

- Customer reference forms (Attachment C) included.
- Customer references not required *(offering own GSA schedule or products only)*

19. Local government agency orders accepted *(check if applicable)*

20. Minimum order amount (select one)

None or \$ _____

21. Darfur Contracting Act Certification *(check if Attachment D included, only required for non-IT goods/services)*

22. Federal GSA schedule selected as base for this CMAS Application:

GSA Schedule No.: _____

GSA Schedule Company Name.: _____

GSA Schedule Term:

Start Date: _____

End Date: _____

23. Offering all or part of GSA schedule *(identified in #24, check only one box)*

- Offering all products and/or services in GSA schedule
- Offering only products and/or services identified below:

Brand(s) of products offered *(include a separate list if needed)*:

Brand Name	Hardware	Software

Services offered *(check only the services offered that are in the base GSA schedule identified in #22 above)*:

- Installation Repair Hardware Maintenance
- Software Maintenance IT Consulting
- Non-IT Consulting Training Courses
- Personal Services IaaS PaaS SaaS

CMAS APPLICATION

SECTION 2 – CMAS APPLICATION, CONTINUED

24. False Claims:

Section 12650 et seq. of the California Government Code provides for the imposition of treble damages for making false claims against the State. False claims may also result in immediate termination of the schedule resulting from this application (*no action needed by applicant on this item*).

25. Signature Block:

The person identified below is authorized to bind this company to the CMAS resulting from this application. By signing below, the contractor certifies compliance with the requirements listed in the CMAS Contractor Certification (Attachment A consisting of 1 page). California Code requires that you provide your application with an original signature.

Company Name

Printed Name and Title of Signer (Example: Mr. John Doe, President)

Authorized Signature

Date Signed

CMAS APPLICATION

SECTION 3 – INSTRUCTIONS FOR COMPLETING APPLICATION

These are the corresponding set of instructions for each numbered item in the application.

1. Company making CMAS offer

Provide your company name, street address (no rental box or PO Box), city, state, and zip code. If you wish to be shown on your CMAS as a “doing business as” (dba) instead of the company name as registered with the Secretary of State, include your dba name here. See the documentation required for a dba in #2.

If your company previously held a CMAS under a different company name, include that information here.

2. Fictitious business name

Companies “doing business as” (dba) a different name than as registered with the California Secretary of State, must include a valid Fictitious Business Name Statement with their application. This statement is filed with the California County in which your firm conducts business, and is valid for five years from the date it was filed in the office of the County Clerk. When the company has no place of business in California, they shall file with the [Sacramento County Clerk](#).

Fictitious business name must match Payee Data Record, Std. 204 Form.

3. New or renewal CMAS

A CMAS Application is considered new if it is the first time a company has offered a particular base GSA schedule.

A CMAS Application is considered a renewal if,

- 1) The company is offering the same base GSA as their original CMAS;
- 2) The base has been extended or renewed for a term of one year or more; and
- 3) The existing CMAS has not expired

The same documents and information are required for a renewal request as for a new application. See the “[CMAS Management & Information Guide](#)” at the [CMAS website](#) for directions on renewing a CMAS schedule.

4. Contact: Questions on resulting schedule

Provide your company’s CMAS contact person and their contact information. This person is the first point of contact for CMAS customers needing information about, or a copy of your company’s CMAS. Only one person’s name can be provided for this purpose. The name and contact information will be shown at the CMAS website along with your company name and CMAS schedule number.

5. Contact: Questions regarding application

If the CMAS Unit has questions regarding your CMAS Application, and if the best person to contact at your company is someone other than your CMAS contact person named in #4, then provide that person’s name and contact information here.

6. Contact: Authorized consulting firm

If a consulting firm has been hired to complete and submit the CMAS Application on your behalf, provide the consulting company’s name and contact information. By signing this application, you are authorizing this consulting company to act on your behalf regarding all questions relevant to this application.

7. Address where Purchase Orders are sent

Provide the mailing address where purchase orders issued against the CMAS should be sent. Either a street address or PO Box is acceptable. In the “Fax Number” field, either provide a fax number where orders can be sent or state “Not Applicable.” In the “Email Address” field, either provide an email address where orders can be sent or state “Not Applicable.” Complete the “Attention” field.

8. CMAS California Terms & Conditions

To review the current CMAS Terms and Conditions visit the [CMAS website](#) and select “CMAS Terms and Conditions.”

Your CMAS Application must include acceptance of the current, applicable CMAS Terms and Conditions without exceptions. There are three sets of Terms and Conditions:

- 1) CMAS IT Goods & Services
- 2) CMAS Non-IT Goods
- 3) CMAS Non-IT Services

Check only one box next to the set that applies to your CMAS application. Proposed changes to the CMAS State of California Terms and Conditions will not be considered.

9. Payee Data Record (Std. 204)

A completed [Payee Data Record \(Std. 204\)](#) is required before a company can receive payment from the State of California. All CMAS Applications must include a completed Payee Data Record.

The instructions to complete the Payee Data Record are on page 2 of the form. For your CMAS application, leave Section 6 of the Payee Data Record blank.

Payee Data Record, Std. 204 Form, must match the Fictitious Business Name Statement.

CMAS APPLICATION

SECTION 3 – INSTRUCTIONS FOR COMPLETING APPLICATION, CONTINUED

10. Secretary of State (SOS)

If your company is a Corporation, a Limited Liability Company (LLC), a Limited Liability Partnership (LLP), or a Limited Partnership (LP), you must be registered with the [California Secretary of State](#) (SOS) to be awarded a CMAS. For Corps, LLCs, and LPs, a screen print or entity number from the SOS website showing your status as active will meet this requirement. For LLPs, a copy of your Certificate of Status from the SOS dated within the last 6 months is required. The contact information for the SOS is available on their website, or call (916) 657-5251. If your company is a Sole Proprietor or a Partnership, registration with the SOS is not required.

11. California Seller's Permit

In accordance with Public Contract Code Section 10295.1, before being awarded a State of California contract to provide personal tangible property, your firm must hold a valid California Seller's Permit or Certification of Registration – Use Tax issued by the California Department of Tax and Fee Administration (CDTFA). If applicable, you must provide your California Seller's Permit number with your CMAS Application. The contact information for the CDTFA is available on their website or call (800) 400-7115.

12. California Contractor's License

All companies who construct or alter any building, highway, road, parking facility, railroad, excavation, or other public structure in California must be licensed by the [Contractors State License Board \(CSLB\)](#). This type of work is considered Public Works. The CMAS requirements for including Public Works components on a CMAS are:

- CMAS purchase orders may allow for Public Works installation only when it is incidental to the total purchase order amount. This means the total dollar value of all public works installation services included in the purchase order must not exceed the total dollar value of the products.
- When a Contractor's License is required, the prime contractor and any subcontractors must hold a valid license for the type of work being performed.
- The public works installation service must be included and priced in the base GSA schedule for it to be included in a CMAS.

Examples of Public Works components covered on the CMAS Program are the installation of carpet, pulling cable and wire, and attaching shelving systems to the walls or floor. See more information about Public Works projects in the "CMAS Management & Information Guide". The contact information for the CSLB is available on their website or call (800) 321-2752.

13. Company's business status

Check the applicable box(es) to identify if your company is a California certified small business (SB) or disabled veteran business enterprise (DVBE), or a large business. Small businesses that are not certified by the State of California as a SB will be shown as a large business on their CMAS.

If your company is a California certified SB or DVBE, include your certification number.

NOTE: The Department of General Services waives the administrative fee charged to State agencies if they place their CMAS order with a California certified SB. Also, the incentive fee charged to contractors for local agency CMAS orders is waived if the contractor is a California certified SB.

For information on [SB and DVBE certifications](#), visit their website or call (916) 375-4940.

14. Not Specifically Priced (NSP) Provision

The Not Specifically Priced (NSP) Provision enables an agency to include in their CMAS purchase order non-schedule products and related services that are subordinate and peripheral to the other items on the order. The NSP Provision is applicable to products and the related services, but cannot be included in a CMAS order for software, consulting services, or personal services including training. See Attachment B for the details of the NSP Provision.

15. Resellers on CMAS

Resellers are permitted on a CMAS for products only if the CMAS holder is a manufacturer or publisher. Resellers are not permitted on schedules for consulting or personal services.

If the CMAS contractor authorizes resellers, a list of authorized resellers is required. The following information must be included for each reseller:

- Resellers receiving direct payment from the State must be registered with the California Secretary of State (SOS) if they are a Corporation, LLC, LLP, or LP.
- Include a screen print from the SOS website for each reseller to document their status is "active." For LLPs, a copy of the Certificate of Status from the SOS dated within the last 6 months is required.
- Include a Payee Data Record (STD 204) form for each reseller.

CMAS APPLICATION

SECTION 3 – INSTRUCTIONS FOR COMPLETING APPLICATION, CONTINUED

On an attached sheet, provide the following information for each reseller: company name, address, contact person's name, phone number, fax number (in any), and email address. If numerous resellers are requested, the CMAS analyst may request a soft copy of this information.

Resellers cannot be listed on a CMAS if they are only marketing products and not performing a commercially useful function associated with the schedule, such as accepting orders or providing products.

16. CMAS Product & Service Codes

CMAS [Product & Service \(P&S\) Codes](#) are used to identify, describe and market the primary products and/or services offered. Contractors may select up to 12 CMAS P&S Codes per base schedule offered. At least one of the codes selected must be a product description or a service description other than a brand code. In the space to the left of each code selected, provide a page number where that brand, product, or service can be found in the base schedule offered. Only submit the pages of CMAS P&S Codes on which a code has been selected.

CMAS applicants can propose new CMAS Product & Service Codes if the product or service offered is not represented by an existing code. To do so, write the proposed code description anywhere on the list of existing CMAS Product & Service Codes for review and consideration by the CMAS Unit.

CMAS contractors can sell all of the products/services approved in their CMAS, and are not limited to the CMAS P&S Codes selected. Customer agencies will use these codes to search the CMAS website for brands, products, or services they need to procure.

17. CAL-Card

[CAL-Card](#) is a payment mechanism. If your company accepts this form of payment, then check the box advising CAL-Card is accepted. Non-acceptance of CAL-Card will not affect the approval of your CMAS.

18. Customer references (*Attachment C*)

Contractors offering consulting or personal services from their own Federal GSA schedule are not required to include customer references with their CMAS Application.

Contractors offering consulting, personal, or technical (without products) services from another company's Federal GSA schedule must include customer references to substantiate their qualification to provide these services. See Attachment C of this application for definitions of the various types of services, the customer reference forms, and the instructions to complete these forms.

GSA schedules for consulting services must have labor categories with:

- Well defined functional requirements that identify the tasks to be performed. (Functional responsibilities described only as "ability to" or "experience with" are not acceptable.)
- Minimum experience requirements
- Minimum education requirements

Newly formed companies who do not have a minimum of three customer references in their company name can still be considered for a CMAS. References may be submitted in the name of the owner and/or partner(s) for services prior to the formation of the new company. The resulting CMAS will be restricted so only the owner and/or partner(s) can provide services on the schedule. After a minimum of 6 months, and after the new company has a minimum of 3 customer references in their company name, a request to remove the restriction may be submitted.

19. Local government agency orders

A local government agency is any city, county, district, other local governmental body, or educational system including the California State University (CSU), the University of California (UC), K-12 public schools, and community colleges empowered to expend public funds.

Supplier must indicate your company's acceptance of local government agency orders placed against your CMAS. Suppliers must agree to pay the DGS-PD a 1% incentive fee for all CMAS orders from local government agencies. This incentive fee is waived for all California Certified Small Businesses.

20. Minimum order amount

This is the minimum order amount your company will accept against your CMAS. If your company has no minimum order requirement, check the box next to "None". If your company has a minimum order amount, provide that dollar amount in the space provided.

21. Darfur Contracting Act Certification

Pursuant to Public Contract Code Sections 10475, et seq., procurements for non-IT goods or services must address the requirements of the Darfur Contracting Act. Suppliers offering non-IT goods or services must complete and include with their CMAS Application the Darfur Contracting Act Certification, Attachment D of this application. See the instructions for completing this certification on page 20.

CMAS APPLICATION

SECTION 3 – INSTRUCTIONS FOR COMPLETING APPLICATION, CONTINUED

22. Federal GSA schedule selected

Provide the Federal GSA schedule number offered as the base for your CMAS, the base schedule owner (company name), and the base schedule start and end dates. A separate CMAS Application must be submitted for each base GSA schedule offered.

See Section 1, Step 1, "Find a Base Federal GSA Schedule" for a link to the GSA eLibrary, which can be used to search for a GSA schedule. This section also contains a link to the CMAS requirements for base GSA schedules.

23. CMAS offering all or part of GSA schedule

For your company's CMAS Application, you can offer all of the products and/or services available on the base GSA schedule, or only portions of it. If your company is offering the entire base GSA schedule, check the first box and skip to #27.

If your company is offering only certain portions of the base GSA schedule, check the second box and complete the information identifying the brands and/or services offered. All products and/or services must be priced in the base GSA schedule to be included in your CMAS application.

24. False Claims

By signing this application, you are making a legally binding offer to the State of California to establish a CMAS for your company. California Government Code Section 12650 et seq., provides for the imposition of treble damages for making false claims against the State. False claims may also result in immediate termination of the CMAS resulting from this application.

25. Signature Block

This CMAS Application must be signed by a person authorized to bind your company to the CMAS resulting from this application.

The CMAS Contractor Certification, Attachment A, contains several requirements of CMAS contractors. All applicants must read and agree to these requirements in order to be awarded a CMAS. By signing the application, your company agrees to comply with all of these requirements.

Sign and date the application in ink, and provide all required information in the signature block. California Code requires that you provide your application with an original signature.

CMAS APPLICATION

ATTACHMENT A – CMAS CONTRACTOR CERTIFICATION

By signing the CMAS Application, applicant certifies that their company will comply with the following requirements:

Contractor Responsibility	My company will be responsible, in accordance with the terms and conditions of the schedule, for all products and services sold through my company's CMAS.
Sell Only Approved Products and Services	<p>My company will sell only products and services approved for my CMAS. This may include the entire or partial base Federal GSA schedule.</p> <p>My company is authorized to resell all products identified in our CMAS application.</p> <p>All products and services offered by my company under our CMAS appear on and meet all requirements expressly stated in the base Federal GSA schedule.</p>
Services	My company will perform services only if specifically provided for in the CMAS. All services performed by my company will be by publisher or manufacturer authorized personnel and meet publisher or manufacturer documented specifications, unless otherwise specifically stated in the agency's purchase order/Statement of Work.
Schedule Prices	My company will offer our CMAS customers prices for products and services equal to or lower than the prices in the base Federal GSA schedule.
Keeping Current	<p>My company will sell only the most current CMAS approved products and services as approved for the base Federal GSA schedule. My company will maintain files (including all modifications) to substantiate compliance with this requirement.</p> <p>This requirement also applies to my company if I am establishing my CMAS based on another company's Federal GSA schedule.</p>
Education & Experience Requirements	My company will only provide qualified personnel who meet the education and experience requirements as stipulated in the base Federal GSA schedule.
Product Installation	My company will perform product installation only if specifically provided for in the CMAS. All product installations performed by my company will be by manufacture-authorized personnel and meet manufacturer-documented specifications, unless otherwise specifically stated in the agency's purchase order/Statement of Work.
References and Resumes	My company will provide customer references and resumes upon request by the ordering agency.

CMAS APPLICATION

ATTACHMENT B – NOT SPECIFICALLY PRICED (NSP) PROVISION

What is NSP? The Not Specifically Priced (NSP) provision enables agencies to include in their purchase orders products and services that are not listed in the base contract.

Contractor Option and Responsibilities The NSP provision will be included in the CMAS at the option of the CMAS contractor and the CMAS Unit except as stated below. If the NSP provision is included in the CMAS, the Contractor agrees to monitor all purchase orders received to ensure adherence to all NSP provisions.

NSP Not Available The NSP provision cannot be included in purchase orders for services or software only. Agency purchase orders for only NSP items are prohibited.

NSP Dollar Limits **Purchase orders \$250,000 or less:** Total dollar value of all NSP items shall not exceed \$5,000.
Purchase orders exceeding \$250,000: Total dollar value of all NSP items shall not exceed 5% of the total cost of the purchase order, or \$25,000, whichever is less.

Clearly Identify NSP NSP items must be clearly identified on the purchase order.

The following NSP items are specifically excluded from any purchase order issued under this CMAS:

Items Specifically Excluded

1. Items not intended for use in direct support of the CMAS priced items identified in the same purchase order.
 2. Supply type items, except for the minimum amount necessary to provide initial support to the priced CMAS items included in the same purchase order.
 3. Items not meeting the Productive Use Requirement.
 4. Any other items or class of items specifically excluded from the scope of the CMAS.
 5. Public Works components that are NOT incidental to the overall project requirements.
 6. Products or services the contractor is NOT factory authorized or otherwise certified or trained to provide.
-

Other NSP parameters are:

Other NSP Parameters

1. A purchase order containing NSP items may be issued only if it results in the best value alternative to meet agency needs.
2. Any product or service already specifically priced and identified in the base contract may not be identified as a NSP item on a purchase order.
3. All NSP items included in a purchase order are subject to all the terms and conditions set forth in the CMAS.

CMAS APPLICATION

ATTACHMENT B – NOT SPECIFICALLY PRICED (NSP) PROVISION, CONTINUED

4. Trade-ins and upgrades are permissible where the CMAS makes specific provision for the action.
-

NSP Example

A cable not listed in the base contract is subordinate to a facsimile machine and is eligible to be an NSP item, subject to that cable meeting the remaining NSP requirements. However, printers or facsimile machines that are not listed in the base contract are not eligible to be an NSP item.

CMAS APPLICATION

ATTACHMENT C – CUSTOMER REFERENCE FORM

See pages 17 & 18 for instructions on completing this reference form.

Company (CMAS Applicant)	
Project Title	
Project Begin Date	
Project End Date	
Reference Customer Agency/Company Street Address City, State and Zip Code Contact Person Contact Phone Number	Extension:
Project Description: This description should briefly describe what the project entailed, i.e. the scope of the project.	
Requested Job Titles/ Labor Categories: List the job titles offered from the base GSA schedule you identified in item #22 on page 6 that this reference supports.	
Requested CMAS Product & Service Codes: List the CMAS Product & Service Codes this reference supports. Example: IT Consult-Project Mgmt Bus Consult-Org Assessment See page 10 for link to CMAS codes.	

Continued on next page

CMAS APPLICATION

ATTACHMENT C – CUSTOMER REFERENCE FORM

Specific Services Provided: For detailed instructions, see page 17.

The specific services my company provided to this referenced customer within the last 2 years are:

CMAS Applicant Company:

By signing below, I am certifying that the services described above (*or on an attached sheet*) were provided to this reference customer, and they support the job titles/labor categories offered from the base GSA schedule.

Printed Name and Title

Signature of CMAS Applicant

Date Signed

Reference Customer Agency or Company:

By signing below, I am verifying that the services described above (*or on an attached sheet*) provide an accurate description of the services provided to my agency/company by the CMAS Applicant Company named above.

Printed Name and Title

Signature of Reference Customer

Date Signed

CMAS APPLICATION

ATTACHMENT C – INSTRUCTIONS FOR COMPLETING REFERENCES

Definitions of Services	<p><u>Consulting Services</u>: Services of an advisory nature that provide a recommended course of action or personal expertise (product of the mind).</p> <p><u>Personal Services</u>: Services that have someone doing something, e.g., film production, interpretation/translation, record shredding, training, etc.</p>
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Customer Reference Requirements	<p>The following requirements apply to customer references:</p> <ul style="list-style-type: none">• Provide a minimum of 3 customer references to support all of the job titles/labor categories offered from the base GSA schedule. This does not mean 3 references per labor category, as each reference can encompass multiple labor categories. If necessary, more references can be submitted as needed to support all categories.• References must be for projects your company completed within the last 2 years.• References can be from either the public or private sector.• Must use the required reference form in this application.• The reference customer must sign and date the reference.
--	--

Company (CMAS Applicant)	<p>Enter the name of the company that provided the service. This is the CMAS applicant company. For newly formed companies who do not have a minimum of three customer references in their company name, enter the name of the owner or partner who provided the services to this referenced customer. See more information under Item #18 on page 10 of this application.</p>
---------------------------------	--

Project Title	<p>Enter the project title.</p>
----------------------	---------------------------------

Project Begin and End Date	<p>Enter the project start date for services performed within the last two years. Enter the last date services were performed. If the project has been started but not completed, enter “On-going” for the end date and identify the task(s) that have been completed in the narrative. Only job titles/labor categories for the completed components of the project will qualify for consideration.</p>
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Reference Customer Name and Contact Information	<p>Enter the agency/company name of the reference customer who received the services. Provide this agency/company address, contact person, and phone number of the person who has direct knowledge of the services your company provided. If you worked as a subcontractor on a project, your customer would be the prime contractor who hired your company.</p>
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Project Description	<p>Briefly describe the nature of the project. Explain what the project entailed and what services your company was hired to provide.</p>
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CMAS APPLICATION

ATTACHMENT C – INSTRUCTIONS FOR COMPLETING REFERENCES, CONTINUED

Job Titles/Labor Categories List the requested job titles/labor categories from the base GSA schedule offered that this reference supports.

CMAS Products & Service Codes List the CMAS Product & Service (P&S) Codes your company selected that relate to this reference. The CMAS P&S Codes must correlate with the services offered from the base Federal GSA schedule.

In narrative form, describe the services your company provided in chronological order of the project. Provide enough detail to demonstrate a clear correlation between the services provided by your company to the GSA job titles/labor categories offered, and to the CMAS P&S Codes selected. If more space is needed, use an additional sheet(s), which must be signed and dated by the reference customer.

GSA schedules for consulting services must have labor categories with:

Specific Services Provided

- Well defined functional requirements that identify the tasks to be performed. (Functional responsibilities described only as “ability to” or “experience with” are not acceptable.)
- Minimum experience requirements
- Minimum education requirement
- Labor rate(s)

For guidance, reference the [FAQs](#) regarding the CMAS application process at the [CMAS website](#).

CMAS Applicant Company Signature A representative from the CMAS applicant company must sign and date the reference certifying that services provided to this reference customer support the job titles/labor categories offered from the base GSA schedule.

Reference Customer Agency/Company Signature The contact person from the reference customer agency or company must sign and date the reference verifying that the services described by the applicant provide an accurate description of the services provided.

Contact CMAS for Questions Applicants with questions regarding customer references for services offered can contact the CMAS Unit. See the cover page of this application for CMAS contact information.

CMAS APPLICATION

ATTACHMENT D – DARFUR CONTRACTING ACT CERTIFICATION

Pursuant to Public Contract Code section 10478, if a bidder or proposer currently or within the previous three years has had business activities or other operations outside of the United States, it must certify that it is not a “scrutinized” company as defined in Public Contract Code section 10476. (See back for instructions.)

Therefore, to be eligible to submit a bid, proposal, or CMAS application, please insert your company name and Federal ID Number and complete only one of the following three paragraphs (via initials for Paragraph #1 or Paragraph #2, or via initials and certification for Paragraph #3):

Company/Vendor Name (*Printed*)

Federal ID Number

Printed Name and Title of Person Initialing (*For Options 1 or 2*)

1. _____
Initials

We do not currently have, or we have not had within the previous three years, business activities or other operations outside of the United States.

OR

2. _____
Initials

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

OR

3. _____
Initials &
Certification
Below

We currently have, or we have had within the previous three years, business activities or other operations outside of the United States, but we certify below that we are not a scrutinized company as defined in Public Contract Code section 10476.

CERTIFICATION FOR #3

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective proposer/bidder/applicant to the clause listed above in #3. This certification is made under the laws of the State of California.

By (Authorized Signature)

Printed Name and Title of Person Signing

Date Executed

Executed in the County and State of

CMAS APPLICATION

ATTACHMENT D – DARFUR CONTRACTING ACT CERTIFICATION INSTRUCTIONS

Note Regarding Change of Status – If your company has a change of status, with regard to this certification, during the term of your contract(s) then it is incumbent on your company to submit an updated Certification. For questions regarding a change of status, please contact the contract's designated State Contract Administrator.

This Certification pertains to the Darfur Contracting Act (Act). All companies offering Non-Information Technology goods and/or services must complete this Certification.

Background

Effective January 1, 2009, procurements for goods or services must address the requirements of the Darfur Contracting Act of 2008 (Act) (Public Contract Code sections 10475, *et seq.*; Stats. 2008, Ch. 272). The Act was passed by the California Legislature and signed into law by the Governor to preclude State agencies generally from contracting with **SCRUTINIZED** companies that do business in the African nation of Sudan (of which the Darfur region is a part), for the reasons described in Public Contract Code section 10475.

A **SCRUTINIZED** company is a company doing specified types of business in Sudan as defined in Public Contract Code section 10476. **SCRUTINIZED** companies are ineligible to, and cannot, bid on or submit a proposal for a contract with a State agency for Non-IT goods and/or services. (Public Contract Code section 10477(a)). Therefore, Public Contract Code section 10478(a) requires a company that currently has (or within the previous three years has had) business activities or other operations outside of the United States to certify that it is not a **SCRUTINIZED** company in order to submit a bid or proposal to a State agency. (See #1 and #3 on the Certification).

A **SCRUTINIZED** company may still, however, submit a bid or proposal for a contract with a State agency for goods or services if the company first obtains permission from the Department of General Services (DGS) according to the criteria set forth in Public Contract Code section 10477(b). (See #2 on the Certification).

Instructions for Certification

- Provide the Certification to an appropriate official within your company.
- The approving official shall fill in the company name and federal ID number and initial either item #1, #2, or #3. If item #3 is initialed, then the Certification for #3 must also be completed by an individual authorized to legally bind your company.
- Include the original, completed Certification with your CMAS application.
- If you are unable to certify as to #1, #2, or #3, or if you have any questions regarding the Certification, please contact CMAS at (916) 375-4365 or via e-mail at cmas@dgs.ca.gov.

Change of Status

If your company has a change of status with regard to this certification during the term of your contract, then it is incumbent on your company to submit an updated Certification. For questions regarding a change of status, please contact the contract's designated State Contract Administrator.

False Certification Penalties

Pursuant to Public Contract Code section 10479, a company that submits a false certification shall be subject to a monetary civil penalty of \$250,000 or twice the amount of the contract, whichever is greater; possible contract termination; ineligibility to bid on state contracts for a minimum of three years; and possible additional civil action, costs and fees.

CMAS APPLICATION

ATTACHMENT E – CHECKLIST

Purpose

The purpose of this checklist is to ensure all required documents are included with your CMAS Application. Put a check mark in the box next to each document included in your application. Missing or incomplete documents from this checklist may cause your CMAS Application to be returned unprocessed.

Required Attachments (Must be signed)

- CMAS Application
 - Payee Data Record – Std. 204
-

Required Attachments (No signature)

- CMAS Products & Service Codes Selected
-

Other Attachments (Check only applicable items)

- Secretary of State – Documentation of Registration (screen print or certificate of status)
 - Fictitious Business Name Statement
 - List of Authorized Resellers
 - Customer References
 - Darfur Contracting Act Certification
-

CMAS Quarterly Activity Reports

Companies who have previously been awarded a CMAS must be current with all required CMAS Quarterly Activity Reports prior to being awarded a new, renewed or modified CMAS. See the “CMAS Management & Information Guide” for information on CMAS Quarterly Reports.