**ATTACHMENT 2 – PROPOSAL CHECKLIST**

This **Stage 1** checklist is being provided to help proposers submit the appropriate documents stated below within their proposal package.

In order to be deemed responsive, a proposal package must contain all of the items identified below as required; optional attachments that are not applicable do not need to be included. The Proposer Agency must complete this checklist to confirm the items contained in the proposal submission by marking the boxes next to the items included and be returned with the **Stage 1** proposal package.

|  |  |  |
| --- | --- | --- |
| **REQUIRED ADMINISTRATIVE ATTACHMENTS** | | |
| **Included** | **Number** | **Name** |
|  | 1 | Proposal Cover Page |
|  |  |  |
|  | 2 | Proposal Checklist |
|  | 3 | Proposer’s Minimum Qualifications Certification |
|  | 4 | Proposer Agency Fact Sheet |
|  | 5 | Proposed Subcontractor – Media Buying Agency Fact Sheet |
|  | 6 | Proposed Subcontractor Agency Fact Sheet(s) |
|  | 7 | Guaranty |
|  | 8 | Conflict of Interest |
|  | 9 | Bankruptcy and Litigation Disclosure |
|  | 10 | Payee Data Record (STD. 204) |
|  | 11 | Contractor Certification Form |
|  | 12 | Statement of Economic Interests Certification (SEI, Form 700) |
| ~~☐~~ | ~~15~~ | ~~Bidder Declaration (GSPD-05-105)~~ |

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| **REQUIRED ADMINISTRATIVE DOCUMENTS** | |
| **Included** | **Name** |
|  | Certificate of Liability Insurance (or letter explaining why it is not included at this time) |
|  | Proof of Worker’s Compensation Liability Insurance |
|  | Proof of Errors and Omissions Insurance |
|  | Proof of Automobile Liability Insurance (or letter explaining why it is not included at this time) |
|  | Proof of Active status with the California SOS (Current Certificate of Status or copy of Entity Detail page from SOS Business Search) |

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| **REQUIRED TECHNICAL NARRATIVES** | |
| **Included** | **Name** |
|  | Agency Strengths and Experience (no more than six (6) pages) |
|  | Advertising, Creative and Placement Effectiveness (no more than seven (7) pages) |
|  | Project Assumptions, if any (no more than number two (2) pages) |

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| **OPTIONAL ADMINISTRATIVE ATTACHMENTS** | | |
| **Included** | **Number** | **Name** |
|  | 10a | Payee Data Record Supplement (STD. 205)  This form is optional. Form is used to provide remittance address information if different than the mailing address on the STD 204 – Payee Data Record. Use this form to provide additional remittance addresses and additional Authorized Representatives of the Payee not identified on the STD 204.) STD 205 (New 03/2021) |
| ~~☐~~ | ~~13~~ | ~~Target Area Contract Preference Act Preference Request for Goods and Services Solicitations (STD. 830)~~ |
| ~~☐~~ | ~~14~~ | ~~Bidder’s Summary of Contract Activities and Labor Hours (DGS/PD 526)~~ |
| ~~☐~~ | ~~16~~ | ~~Disabled Veteran Business Enterprise Declarations (STD. 843)~~ |

This **Stage 2** checklist is being provided to help proposers submit the appropriate documents and content stated below within their proposal package.

In order to be deemed responsive, a **Stage 2** proposal package must contain all of the items identified below as required. The Proposer Agency must complete this checklist to confirm the items contained in the proposal submission by marking the boxes next to the items included and be returned with the **Stage 2** proposal package.

Checklist for **Stage 2** Proposer Agencies only:

|  |  |  |
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| **REQUIRED ADMINISTRATIVE ATTACHMENTS** | | |
| **Included** | **Number** | **Name** |
| ☐ | 15 | Bidder Declaration (GSPD-05-105) |
|  | 17 | Staffing Plan and Hourly Rates |
|  | 18 | Client References |

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| **REQUIRED MODEL CONTRACT WITH EXHIBITS** | |
| **Included** | **Name** |
|  | Exhibit C, Attachment 1 – Resumes |

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| **REQUIRED SITE VISIT CONTENT** | |
| **Included** | **Name** |
|  | Agency Presentation that includes an Agency Overview, Case History and Advertising Assignment(s) |
|  | Organizational and Staff Structure |
|  | Creative Reel |

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| --- | --- | --- |
| **OPTIONAL ADMINISTRATIVE ATTACHMENTS** | | |
| **Included** | **Number** |  |
| ☐ | 13 | Target Area Contract Preference Act (TACPA) Preference Request for Goods and Services Solicitations (STD. 830) |
| ☐ | 14 | Bidder’s Summary of Contract Activities and Labor Hours (DGS/PD 526) |
| ☐ | 16 | Disabled Veteran Business Enterprise Declarations (STD. 843) |

This **Stage 3** checklist is being provided to help proposers submit the appropriate documents and content stated below within their proposal package.

In order to be deemed responsive, a **Stage 3** proposal package must contain all of the items identified below as required. The Proposer Agency must complete this checklist to confirm the items contained in the proposal submission by marking the boxes next to the items included and be returned with the **Stage 3** proposal package.

Checklist for **Stage 3** Proposer Agencies only:

|  |  |
| --- | --- |
| **REQUIRED MODEL CONTRACT WITH EXHIBITS** | |
| **Included** | **Name** |
|  | Standard Agreement (STD. 213) |
|  | Exhibit A – Scope of Work |
|  | Exhibit B – Budget Detail and Payment Provisions |
|  | Exhibit B, Attachment 1 – Cost Proposal |
|  | Exhibit C – General Terms and Conditions |
|  | Exhibit C, Attachment 2 – Media and Subcontractor Liability Verification Clause |
|  | Exhibit D – Privacy Addendum |
|  | Exhibit E – Travel Reimbursement |
|  | Exhibit F – Contractor Release |
|  | Exhibit G – Marketing and Branding Guidelines |

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| **REQUIRED Oral Presentation and Financial Package CONTENT** | |
| **Included** | **Name** |
|  | Advertising Assignment(s) |
|  | Financial Records (due October 4, 2024) |