

REQUEST FOR PROPOSAL (RFP)

For

**CONSULTANT FOR EVALUATION, TRAINING AND
TECHNICAL ASSISTANCE DELIVERY**

RFA# CV17-105

October 25, 2017

State of California



1400 10th Street, 2nd Floor
Sacramento, CA 95814

Written Proposals Due at the
CaliforniaVolunteers Office
No Later Than:

November 8, 2017 at 5pm

FAXES and EMAIL WILL NOT BE ACCEPTED IN LIEU OF PROPOSALS

Table of Contents

BACKGROUND..... 3

PURPOSE OF RFP..... 3-4

SCOPE OF RFA & BIDDER ADMONISHMENT..... 4-5

SCOPE OF WORK.....5-10

KEY ACTION DATES.....10

PROPOSAL INSTRUCTIONS.....11

SELECTION PROCESS.....12-13

COST AGREEMENT CERTIFICATION..... 14

CONSULTANT DELIVERY CONTRACT.....15

DEPARTMENT CONTACT..... 16

Attachments to RFP

Exhibit 1 – Standard 204 Payee Data Record Form

Exhibit 2 – Standard 213 Agreement

BACKGROUND

CaliforniaVolunteers (CV), Office of the Governor, addresses community and state challenges by investing in high impact service solutions, while leveraging public, private, and nonprofit partnerships and resources. Through AmeriCorps, Disaster Volunteering, and Community Partnerships, CaliforniaVolunteers transforms small investments into big community impact.

Karen Baker, State of California Chief Service Officer, leads the organization in consultation with a 25-member Commission appointed by the Governor. The Commission supports the mission and objectives of CaliforniaVolunteers and fulfills statutory responsibilities.

CaliforniaVolunteers receives federal funds from the Corporation for National and Community Service (CNCS) to invest in AmeriCorps programs. AmeriCorps is a national service program that provides opportunities for Americans each year to deliver intensive results-driven service. An AmeriCorps member is an individual who meets the eligibility requirements and engages in community service through an approved national service position. AmeriCorps members are recruited, trained, supervised, and managed by the funded organization, and may receive a living allowance and other benefits while serving.

AmeriCorps grants support the efforts of national and community-based nonprofit organizations to recruit, train and deploy AmeriCorps members to tackle state and local community challenges. AmeriCorps grants are awarded on a competitive basis to eligible organizations that engage members in evidence-based or evidence-informed interventions to strengthen communities. AmeriCorps grants include an allotment of AmeriCorps member positions and provide partial funding to support AmeriCorps projects and programs. Grants are solely for program expenses and cannot be used for general organizational operating expenses. AmeriCorps members or grant funds can help meet unmet needs or can expand an organization's ability to better address community needs, but cannot be used to duplicate, displace or supplant resources that already exist in a community.

PURPOSE OF THIS REQUEST FOR PROPOSALS

AmeriCorps programs are touching lives and transforming communities every day, but our collective capacity to demonstrate and to improve our impact is underdeveloped. Programs have limited evidence about the efficacy of their work and limited insight to help them adapt their programs to make them more effective. A large percentage of CaliforniaVolunteers subgrantee programs are rated at the no evidence or pre-preliminary evidence levels established by CNCS. While there are programs that are at higher levels on the continuum, many of those lack either a plan to move further along, or to continue evaluating the program from a variety of angles. CaliforniaVolunteers needs to build both the Commission and its grantees' evaluation capacity for conducting well-designed and meaningful program evaluation.

To build our subgrantees' evaluation capacity, CaliforniaVolunteers seeks to contract with an Evaluator/contractor experienced with evaluation requirements established by CNCS for AmeriCorps State and National programs to provide evaluation training and technical assistance to approximately 12 AmeriCorps programs. This project has availability of a flat payment of \$5,000 per participating program to cover the cost of evaluation training and technical assistance delivered per the Scope of Work. The total funding available for the Scope of Work is

\$60,000 for a maximum of 12 programs. \$50,000 of the \$60,000 will be covered directly by CaliforniaVolunteers for ten (10) participating programs that have not budgeted for participation in this project as part of their AmeriCorps grant award. \$10,000 of the \$60,000 for the remaining 2 programs will be covered directly by those programs out of each of their AmeriCorps grant awards. The selected contractor must agree to directly bill each of those 2 programs, not covered by CaliforniaVolunteers, for payments. CaliforniaVolunteers and its subgrantees will cover all travel costs for all participants to attend any in-person training sessions. These travel expenses are separate and not included in the \$60,000 available for the Scope of Work.

This project should be designed to not only produce credible findings about impact, but to build the capacity of California State AmeriCorps programs to adapt a culture of learning and continue to move along the CNCS evidence continuum. We believe that capacity is developed over time and through iteration. It requires both instruction and practice. The Evaluator/contractor will offer training in leading techniques of research accompanied by ongoing application and practice for new participants. Programs that are returning after involvement in Phase 1 of this project will be supported by the Evaluator as they continue to build new skills and hone skills previously developed in Phase 1. Since the best evaluation strategies are iterative, the Evaluator will work with our AmeriCorps grantees to design and test strategies, and then refine the design and strategy for future use. To leverage the benefits of a learning community, participants will come together for in person training sessions that are modeled after a collegial learning cohort. At the end of the project, each participating grantee will have conducted a mixed-method evaluation of their programs' design and/or primary intervention. All participants will be required to complete an evaluation report which will articulate the qualitative and quantitative findings as well as strategies for program improvement. Participants will also have the tools developed to support ongoing evaluation including an evaluation plan and a long-term research agenda to improve their position on the evidence continuum, a qualitative interview protocol, and an understanding of the principles of quantitative evaluation.

The Evaluator/contractor, through the course of the project, will work with and support our programs in developing and piloting evaluation strategies to collect data, determine findings, communicate impact and produce data-informed program experiments and innovations.

Further information on the Corporation for National and Community Service (CNCS) and their evaluation requirements and standards as articulated in the AmeriCorps regulations 45 C.F.R. §§2522.500-.540 and .700-.740 can be found on their Knowledge Networks <http://www.nationalservice.gov/resources/evaluation>.

Responses to this RFA will be evaluated based on the total bid, and award, if made, will be to a single bidder awarded the highest points as calculated in accordance with the methodology defined in Section "Selection Process of this RFA".

SCOPE OF THE RFA AND BIDDER ADMONISHMENT

This RFA is being conducted under the policies & procedures developed by the Department of General Services as provided under Public Contract Code Section 12102 et seq. This RFA contains the instructions governing the requirements for a firm quotation to be submitted by interested bidders. The format that bid information is to be submitted and the material to be included therein follows. This RFA also addresses the requirements that bidders must meet to

be eligible for consideration, as well as addressing bidders' responsibilities before and after installation.

SCOPE OF WORK

A. Building AmeriCorps Grantee Evaluation Capacity For Newly Participating Programs (Track 1)

For participants that were not part of Phase 1, the Evaluator/contractor will convene an evaluation team of program leaders and stakeholders (e.g. program staff, board members, service site) from each grantee (AmeriCorps program) in a collegial learning cohort that will meet together monthly from January to June in person or via webinar.

The evaluator/contractor will provide training in-person and via webinar which covers three areas of evaluation practice: *desired impact, inquiry and implication*.

The *desired impact module* should help clarify the intent of the programmatic activities of the AmeriCorps program to be evaluated. This should focus on defining intended impact and identifying indicators of impact, with a strong focus on each program's primary intervention and current contracted performance measure targets.

The goal of the *inquiry module* is to help programs build the skills needed to conduct meaningful and practical evaluation. This phase will commence with training that should cover both qualitative and quantitative evaluation strategies and data analysis. Grantees will then be supported by the evaluator/contractor as they implement evaluation strategies they developed during the training process.

the *implication module* should work with participants to review the data collected during the *Inquiry mole* and should guide participants as they determine findings from the evaluation. This should include mapping themes identified in data analysis and translating themes to findings; using findings to identify program adjustments and experiments; and developing an evaluation report and other communication strategies for evaluation; and finally, building habits of evaluation including developing a plan for future evaluation.

Each program's work must be reviewed by the consultant along the way and feedback provided to ensure the quality of their evaluation tools and to grow their capability to design and implement further evaluations.

At the end of the project, each participating grantee will have conducted a mixed-method outcome evaluation and have an evaluation report articulating qualitative and quantitative findings and strategies for program improvement. They will also have the tools developed to support ongoing evaluation including an evaluation plan and/or an approved plan to improve their position on the evidence continuum, a qualitative interview protocol, and a quantitative instrument that can be adapted to serve as a pre-post test. With further implementation of these tools, participating grantees will have the elements needed to be rated at the preliminary evidence tier established by CNCS.

B. Building AmeriCorps Grantee Evaluation Capacity for Returning Participants (Track 2).

The evaluator will work with returning participants (here after referred to as the Continuation Cohort) to build on the skills developed in the first Phase of the evaluation consultation project. As a part of the continuation, programs will implement the programmatic improvements learned from Phase 1 while continuing to practice their skills through small evaluation projects.

The evaluator will begin working with the continuation cohort in early November 2017 to guide them through implementation of programmatic improvements. Following this, the evaluator will guide the programs in practicing the skills learned through small evaluation projects. These projects will consist of identifying three questions that can be reasonably addressed in month long intervals. Each project will culminate in analysis of data collected during the month and assessing the findings for the purpose of implementing programmatic improvements. The lessons learned from each project should be shared as part of the in-person learning cohort.

The second component of the continuation cohort consists of implementing a second full evaluation. In order to fully utilize the value of the continuation cohort, this new evaluation should be informed by the lessons and strategies learned from Phase 1 and the small evaluation project component. This evaluation should focus on the program’s primary intervention with the intention of helping the program move further along the CNCS Evidence Continuum.

At the end of the project, each program should have completed a mixed-method evaluation project to build evidence for their intervention’s efficacy. Programs should have the skills and knowledge necessary to continue to build on their evidence base as well as to prepare to work with external evaluators in the future.

Project Timeline and Details for Track 1 and 2

CONTENT: Track 1	DETAILS: Track 1	CONTENT: Track 2	DETAILS: Track 2	WHEN?
		Developing program strategy <ul style="list-style-type: none"> • Develop an articulation of the program philosophy and strategy • Identify three questions for further inquiry • Design small learning loops (that can be done in one-month intervals) 	1.5 days in person	November 2017
Connecting with participating program staff and planning convening of	Supported by CV staff	Work with the team to consult on the learning from loop one. Debrief themes and	This can be done	December 2017

**Consultant for Evaluation Training and TA Delivery
RFP# CV17-105**

workshops and project calendar		develop implication and application.	virtually.	
Module 1 – Intro & Defining Desired Impact <ul style="list-style-type: none"> • Introduction to project and guiding models of evaluation • CNCS Evidence Continuum and evaluation requirements • Mini-dive interviews • Key ideas of direct effect 	In-person or via webinar for the learning cohort of grantees	Continue working with the team to consult on the learning from loop two. Debrief themes and develop implication and application.	This can be done virtually.	January 2018
Modules 2 – 4 Should be combined into a 2-day Training Institute:		Launch Second Year of Program Evaluation <ul style="list-style-type: none"> • Capture and share the lessons from the three learning loops • Upgrade the evaluation instruments and strategies from year 1 of Project Impact • More in-depth discussion of quantitative design options • Launch the second round of evaluation • Coaching on Instrument Design and Data Collection • Feedback on qualitative and quantitative instrument design. Check in on qualitative data collection progress. 	The launching of the second year of evaluation will take place during a two day in-person conference. Coaching for instrument design and data collection can take place virtually.	

<p>Module 2 – Theory of Change</p> <ul style="list-style-type: none"> Identifying your core theory of change Naming the strategy for impact Evaluating your Current Performance Measures Using data to inform and improve outcomes <p>Module 3 – Designing Quantitative Instruments</p> <ul style="list-style-type: none"> Characteristics of quantitative research Identifying key quantitative data What makes an effective instrument / Techniques to writing survey items Effective Data Collection strategy Sampling and response rates Loading and deploying an instrument <p>Modules 4 -- Qualitative Evaluation</p> <ul style="list-style-type: none"> Characteristics of qualitative inquiry Developing a qualitative protocol Holding an in-depth interview Review of intended impact, Performance Measures, and theory of change 	<p><i>In-person</i> for the learning cohort of grantees In-person with learning cohort grantees</p> <p>Grantee evaluation teams begin developing instrument and data collection strategy In-person with learning cohort grantees</p> <p>Grantee evaluation teams begin developing instrument and data collection strategy</p>			<p align="center">February 2018</p>
<p>Module 5 – Data Collection</p> <ul style="list-style-type: none"> Collecting data Analyzing data Sampling strategies Logistics of high quality data 	<p>Training via webinar followed by grantee evaluation</p>	<p>The evaluator will check in with participants on their data collection progress.</p>	<p>This can be done virtually.</p>	<p align="center">March Through May 2018</p>

**Consultant for Evaluation Training and TA Delivery
RFP# CV17-105**

management	teams launched to begin research			
Modules 6 – 8 could be combined into a 2-day Training		Review Themes, Findings, and Reports <ul style="list-style-type: none"> • Analyzing data, identifying findings, designing responses, and producing reports. • Integrating learnings from year 1 evaluation, learning loops, and year 2 evaluation • Designing a long-term research agenda based on learnings 	The review of the themes, findings, and reporting will take place during a two day, in-person, conference.	May 2018
Modules 6 & 7 – Findings and Applications <ul style="list-style-type: none"> • Analysis of results from research • Translating themes to findings • Developing reports of the findings • Using evaluation results for improvement • Writing to the Evidence section of the NOFO Module 8 – Building Habits of Evaluation <ul style="list-style-type: none"> • Next steps on the Evidence Continuum • Designing an evaluation plan to build on findings • Developing a long-term research agenda 	In-person with learning cohort grantees Evaluation Team Leaders (team members optional)	Check in on report writing and evaluation planning progress. Reports should be completed by the end of June	This can be done virtually.	June 2018

C. Additional Requirements and Reporting

In addition to the above activities, the Evaluator/Contractor will perform the following for all AmeriCorps grantee participants by program:

1. Convene and conduct the in-person trainings including securing location and working with venue staff.
2. Use or incorporate CNCS Evaluation Resources into training curriculum, available at <http://www.nationalservice.gov/resources/evaluation>.
3. Track or provide CV with a tracking spreadsheet to track completion of participant assignments.
4. Assess each participating program's evaluation capacity growth by using a validated capacity assessment tool and the CNCS *Evidence Checklist* to assess the evidence level of participating programs before and after participation in training provided by the Contractor <http://www.nationalservice.gov/resources/evaluation>.
5. Deliver a minimum of one 1:1 technical assistance (TA) coaching session per program per month to support their implementation of evaluation strategies as part of the project.
6. Provide CV with a written summary of each 1:1 TA session delivered to programs within 14 days.
7. Provide technical assistance to assist programs in developing their long-term research agenda using CNCS' "Developing a Long-Term Research Agenda" https://www.nationalservice.gov/sites/default/files/resource/Jul_30_2015_Developing_a_Long_Term_Research_Agenda_to_Post.pdf
8. At conclusion of project provide written assessment of each participating program's implementation and application of evaluation activities conducted as part of the project including where each program falls on the CNCS Evaluation Continuum and offer recommendation to CV for further training and TTA follow up.
9. Respond to all CV communications within 48 hrs.

KEY ACTION DATES

Listed below are the important actions and dates and times by which the actions must be taken or completed. If the State finds it necessary to change any of these dates, it will be accomplished via an addendum to this RFP.

<u>Event</u>	<u>Date</u>
RFA available to prospective Vendors	10/25/2017
Final Date for Proposal Submission	11/8/2017 at 5pm
Proposal Opening and Review	11/9/17
Notice of Intent to Award	11/13/17
Proposed Award Date	11/17/17
Expected Project Start Date	11/20/17

Expected start date is contingent upon CaliforniaVolunteers and Vendor agreement of final contract terms, and upon contract approval from the California Department of General Services (DGS).

COMPLETING AND SUBMITTING THE APPLICATION

To simplify our review process, we ask that you comply with the format and content requirements detailed in this section. Resumes, samples of work, and letters of support are the only exceptions to this requirement. Proposals which are clear and succinct, and do not substitute length for substance, will be most favorably received.

Please submit three (3) copies of your proposal. The first page of your application must be the summary page (page 12 of this RFP). Correlate major sections of your proposal with the proposal narrative instructions below:

PROPOSAL NARRATIVE INSTRUCTIONS [up to 15 double-spaced pages-12pt font]

I. Project Design / Approach (45%):

Provide the CaliforniaVolunteers application review panel with a project plan that demonstrates a well thought out strategy (what will be done and how) to develop and implement an evaluation training and technical assistance project aimed to build the evaluation capacity of AmeriCorps sub-grantees as outlined in the Scope of Work above which includes:

- a comprehensive and cohesive approach to accomplish the scope of work which closely aligns with the project timeline and details outlined on page 6-7
- appropriate milestones, a reasonable timeline and schedule of deliverables to accomplish the work within the period of performance stated
- potential challenges to carrying out the proposed work plan and strategies to address those issues
- evidence of prior experience working with AmeriCorps programs in building evaluative capacity
- deep familiarity with AmeriCorps performance measurement and evaluation requirements
- assurance of meeting reporting requirements and deadlines as outlined in item 'B' under Scope of Work

II. Qualifications (30%)

Clearly describe staff qualifications and expertise in Evaluation practice. Include previous experience with AmeriCorps programs and/or State Commissions in building evaluative capacity and knowledge and assisting programs in evaluation activities including:

- appropriate academic preparation and professional qualifications for the type of T/TA to be conducted
- experience conducting data collection and evaluation activities that are similar to the activities that AmeriCorps programs will undertake
- The ideal organization will have a Ph.D. Evaluator and at least 10 years experience in evaluation and training experience. Ideally there will be more than one staff member delivering the training and offering expertise to our participating grantees. The Ph.D. level person must participate in the delivery of all trainings.

III. Communication style (5%)

Please provide 2 – 3 samples of past work that give evidence of quality and demonstrate an ability to clearly and concisely communicate concepts in non-technical language (include samples of webinar or training materials – webinars can be provided via weblink).

IV. Project management (10%)

Describe your staff’s ability to effectively lead and manage the project and include:

- willingness to manage the planning and convening of training workshops to engage participating program staff in learning cohorts (if done as two 2-day trainings these could be split between northern and southern California)
- willingness to engage program staff on a regular basis to provide progress updates and give input and feedback on the direction of their work
- ability to adhere to a project schedule and conduct work in a timely fashion and keep Commission staff updated on progress and plans
- ability of a Ph.D. level staff member to participate in the delivery of all trainings

V. Cost (10%)

Confirm your ability to deliver the Scope of Work at the level of funds available and agreement to bill for payments according to the method described on page 4 by including a complete Cost Agreement and Certification Form (see page 11) as part of your proposal.

SELECTION PROCESS

Written proposals, including budget estimates, are due (10/27/17 by 5pm). All eligible proposals will be reviewed to determine if they meet the format requirements specified in the RFP. Those that do will be submitted to an agency review panel that will evaluate and score each proposal independently using the criteria specified below.

Project Design / Approach
Proposes a comprehensive and cohesive approach to accomplish the scope of work (i.e., describes a streamlined and efficient approach for how the work will be done)
Proposes appropriate milestones, a reasonable timeline and schedule of deliverables to accomplish the work within the period of performance stated
Describes potential challenges to carrying out the proposed work plan and provides strategies to address those issues
Demonstrates experience working with AmeriCorps programs and in relevant focus areas
Qualifications
Demonstrates appropriate academic preparation and professional qualifications for the type of T/TA to be conducted
Demonstrates experience conducting data collection and evaluation activities that are similar to the activities that AmeriCorps programs will undertake
Demonstrates experience in Evaluation, training others in evaluation methodology and best practice and is very familiar with AmeriCorps programs, CNCS evaluation requirements and terminology and has experience building the evaluative capacity of AmeriCorps programs
The ideal organization will have a Ph.D. Evaluator and at least 10 years experience in evaluation and training experience. Ideally there will be more than one staff member delivering the training and offering expertise to our participating grantees. The Ph.D. level person must participate in the delivery of all trainings.
Has no conflict of interest with the Commission or its AmeriCorps programs

Communication style
Demonstrates an ability to clearly and concisely communicate concepts in non-technical language (provide samples of webinar or training materials)
Samples of prior reports or products are clear, organized, and readable
Project management
Demonstrates an ability to effectively lead and manage the project
Demonstrates willingness to engage program staff on a regular basis to provide progress updates and give input and feedback on the direction of their work
Demonstrates an ability to adhere to a project schedule and conduct work in a timely fashion
Cost
Staffing, materials and supplies, equipment, and travel costs are adequate and reasonable
Amount and distribution of staff hours are adequate and reasonable

The scores for each criterion, based on the above rubric are added to get a final proposal score. The proposal receiving the highest score will be awarded the contract. State Certified Small Businesses will get an additional 5 preference points. Each bidder will be notified thereafter. Notice of the contract award will be given to each contractor and will be posted for a period of 5 days at www.CaliforniaVolunteers.org.

If a contractor feels that the competition or award did not follow State law, a protest may be filed in writing with CaliforniaVolunteers within 24-hour period (excluding Saturday, Sunday, and legal holidays) following the Notice to Award posting on (11/1/17) at the address stated previously. Within 5 days after filing the protest, the protesting contractor shall file with CaliforniaVolunteers a full and complete written statement specifying the grounds for the protest. The bidder/protester must provide relevant facts and evidence to support their claim that includes citing pertinent laws, rules, regulations or procedures on which the protest is based. CV will stop any further action of the proposed contract award until resolution of the protest proposed award has occurred.

Faxes and e-mails will not be accepted in lieu of original proposals.

RFA Cost Agreement Certification

Funding has been allocated to some of CaliforniaVolunteers AmeriCorps programs as part of their grant award to participate in this evaluation capacity-building effort. As such, those programs must be billed directly by the evaluator/contractor. Other programs will have their cost to participate provided by CaliforniaVolunteers' payment directly to the evaluator/contractor. The awarded contractor will be paid the following rate:

\$5,000 per participating program:

- 10 participating programs @ \$5,000 each for a total of \$50,000 will be paid for by CaliforniaVolunteers directly to the contractor per this agreement.
- Any additional participating programs, above 10 programs, will be billed directly by the evaluator/contractor @ \$5,000 per program

The above fees cover the contractor providing the following:

- All activities and deliverables outlined in the Scope of Work
- The cost of facilities use and any other costs related to execution of in-person training events/workshops

Note: All participant travel costs connected to training events are covered separately by either the program or CaliforniaVolunteers.

By signing below, the applicant contractor confirms ability to deliver the Scope of Work at the level of funds available and bill for payment accordingly.

Applicant Representative Signature

Date

Applicant Representative Name



**CONSULTANT FOR EVALUATION TRAINING AND
TECHNICAL ASSISTANCE DELIVERY CONTRACT**

Applicant Name: _____

Applicant's Street Address: _____

City: _____ Zip Code: _____

Contact Person: _____ Telephone: _____

Project Summary/Primary Services:

- Are you requesting the Small Business Preference? Yes No

Signature of individual authorized to enter into contracts:

All statements are correct to the best of my knowledge and I understand that any material misstatements may cause this proposal to be rejected.

Signature: _____ Date: _____

Title: _____

DEPARTMENT CONTACT

The project Representatives during the term of this agreement will be:

State Agency: CaliforniaVolunteers	Contractor:
Name: Dylan Moore	Name:
Phone: (916) 445-5566	Phone:
Email: dylan.moore@cv.ca.gov	Email:

Direct all inquiries to:

State Agency: CaliforniaVolunteers	Contractor:
Section/Unit: Finance and Admin	Section/Unit:
Attention: Dylan Moore	Attention:
Address: 1400 10th Street, 2 ND Floor, Sacramento, CA 95814	Address:
Phone: (916) 319-8443	Phone:
Fax: (916) 445-8317	Fax:

AGREEMENT NUMBER

CV17-105

REGISTRATION NUMBER

1. This Agreement is entered into between the State Agency and the Contractor named below:

STATE AGENCY'S NAME

OPR / California Volunteers

CONTRACTOR'S NAME

2. The term of this Agreement is: **November 20, 2017** through **June 30, 2018**

3. The maximum amount of this Agreement is:

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work	6 page
Exhibit B – Payment Provisions and Budget Detail	2 pages
Exhibit C* – General Terms and Conditions http://www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx	GTC 610 (online)
Exhibit D – Special Terms and Conditions	CNCS (online)

Items shown with an Asterisk (), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.ols.dgs.ca.gov/Standard+Language*

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR

CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.)

BY (Authorized Signature)

DATE SIGNED(Do not type)



PRINTED NAME AND TITLE OF PERSON SIGNING

ADDRESS

STATE OF CALIFORNIA

AGENCY NAME

CaliforniaVolunteers

BY (Authorized Signature)

DATE SIGNED(Do not type)



PRINTED NAME AND TITLE OF PERSON SIGNING

Karen Baker, Chief Service Officer

ADDRESS

1400 10th Street, Sacramento, CA 95814

California Department of General Services Use Only

Exempt per: PCC 10335(a)

PAYEE DATA RECORD

STD. 204 (Rev. 6-2003) (REVERSE)

1	<p><u>Requirement to Complete Payee Data Record, STD. 204</u></p> <p>A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.</p> <p>Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and nonresident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.</p>								
2	<p>Enter the payee's legal business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The mailing address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here.</p>								
3	<p>Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation. The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a).</p> <p>The TIN for individuals and sole proprietorships is the Social Security Number (SSN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN).</p>								
4	<p><u>Are you a California resident or nonresident?</u></p> <p>A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.</p> <p>Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:</p> <table border="0"> <tr> <td>Withholding Services and Compliance Section:</td> <td>1-888-792-4900</td> <td>E-mail address:</td> <td>wscs.gen@ftb.ca.gov</td> </tr> <tr> <td>For hearing impaired with TDD, call:</td> <td>1-800-822-6268</td> <td>Website:</td> <td>www.ftb.ca.gov</td> </tr> </table>	Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov	For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov
Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov						
For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov						
5	<p>Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.</p>								
6	<p>This section must be completed by the State agency requesting the STD. 204.</p>								
	<p><u>Privacy Statement</u></p> <p>Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.</p> <p>It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to \$20,000.</p> <p>You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business.</p> <p>All questions should be referred to the requesting State agency listed on the bottom front of this form.</p>								