

**CITYWIDE TRAINING****PUR 25-024****SUBMITTAL DUE: THURSDAY, APRIL 10, 2025; AT 2:00 PM**

RFP Electronic Mail	Submittal <a href="mailto:city.clerk@stocktonca.gov">city.clerk@stocktonca.gov</a>
Proponent Business Name	David Diskin dba Applied Office
Proponent Contact Name	David Diskin
Proponent Address	PO Box 1582, Lodi, CA 95241
Proponent Phone Number	209-610-0651
Proponent Email Address	david@AppliedOffice.net
Department of Industrial Relations ID Number (if applicable)	N/A



Onsite Software Training

## Proposal

### ➔ Response to RFP PUR 25-024 Citywide Training

**For the City of Stockton**  
September 2025 through August 2030

Submitted By

**David Diskin**  
**Owner, Applied Office**

PO Box 1582  
Lodi, CA 95241-1582



209-610-0651



appliedoffice.net



david@appliedoffice.net

## Executive Summary

David Diskin dba Applied Office is pleased to respond to RFP PUR 25-024 (Citywide Training) and continue its eight-year relationship as a vendor for the City of Stockton.

### Summary of Experience (CL #3)

David Diskin is a **Microsoft Certified Professional** and certified “**Master**” of **Microsoft Office** with over 25 years of computing experience in training, application development, and consulting.

David currently provides on-site computer training to many businesses and government agencies including:

- The City of Stockton
- The City of Tracy
- University of the Pacific
- California Dept of Justice
- Adventist Health (Lodi)
- Illumina
- California Waste Recovery Systems
- Blue Diamond Growers

David is proud to present the following **qualifications and advantages** as your trusted IT training and consulting provider:

- **Local:** David has demonstrated an ability to quickly respond to demand as-needed for in-person classroom delivery and meetings without added charges for travel or being limited to video conferences.
- **Consistency:** As a trusted vendor with the City of Stockton since 2017, David has delivered over 1,800 hours of classes and consulting to City employees.
- **Familiarity:** David is extremely familiar with the City of Stockton’s Microsoft 365 implementation and has consulted on its use of SharePoint, Teams, and other related services since their rollout. David has also developed a rapport with City staff in every department, most notably IT and HR.

- **Convenience:** Without any other employees or subcontractors, David provides a single point of contact for all services including training delivery, facilitation, consulting, and billing.
- **Experience:**
  - 25 years of experience using Microsoft Office
  - 20 years of experience training on Microsoft Office and Windows
  - 20 years of experience creating curriculum on a variety of applications
  - 15 years of experience training on Microsoft SharePoint
  - 8 years of experience training on WebEx
  - 7 years of experience training on Microsoft Teams
  - 7 years of experience training on Adobe Acrobat
  - 7 years of experience delivering training online
- **Certifications:**
  - Microsoft Office User Specialist at the “Master” Level
  - Microsoft Certified Professional
  - CompTIA A+
- **Flexibility:** David’s services include a large catalog of available courses that can be delivered in person and online. Classes are customized based on the City’s specific needs, policies, and implementation. There are no contractual minimums or requirements.

#### Acknowledgement of Addendums (CL #4)

Addendum #1 (on March 28, 2025) is hereby acknowledged.

Addendum #2 (on April 3, 2025) is hereby acknowledged.

#### Proposal Timeframe (CL #5)

This proposal, and all its contents, including the fee proposal, are valid until July 31, 2025.

## Qualifications and Experience

### Firm Organization (5.1.1)

David Diskin dba Applied Office is a sole proprietorship based in Lodi, CA, founded in April 2005.

There are no divisions, parent/holding companies, subcontractors, or other personnel.

For David's resume, please see Appendix A.

Prior experience with government-based contracts includes:

- The City of Stockton (2017)
- California Department of Justice (2009)
- California Office of Emergency Services (2008)
- City of Lathrop (2019)
- City of Tracy (2023)
- San Joaquin County Public Works (2017)

Services to these clients includes training on Microsoft software (including Microsoft 365), consulting and development on Microsoft 365 services (including SharePoint and Power BI), and database development (Access and SQL).

### List of References (5.1.2)

Please see Attachment D.

### Financial Capacity (5.1.3)

Please see Attachment E.

Further, it is affirmed that David Diskin dba Applied Office is not involved in any ongoing bankruptcy, reorganization, liquidation, or dissolution.

#### Qualifications (5.1.4)

It is affirmed that David Diskin dba Applied Office meets the following criteria:

- ✓ Minimum of 10 Years of Experience Training and Delivering on Microsoft Office Applications
- ✓ Extensive Knowledge of Microsoft 365, Adobe Acrobat, HTML, Power BI, Power Query, Windows, and SharePoint
- ✓ Certified Microsoft Office Specialist (MOS) “Master” Level

Further, David Diskin can (and has been) deliver classes at the City’s training center and via Microsoft Teams.

Further, David Diskin dba Applied Office will comply with all City of Stockton regulations, including:

- ✓ Execution of the Professional Services Agreement (PSA)
- ✓ Provide a Certificate of Insurance
- ✓ Execution of a Mutual Non-Disclosure Agreement (MNDA)
- ✓ Hold Appropriate Business Licenses

All services will be billed at a flat, hourly rate.

## Method of Approach (5.2)

### Scope of Work (5.2.1)

David Diskin dba Applied Office has read and understands the requirements of the Scope of Work.

This proposal is to provide live, instructor-led training for City employees on Microsoft 365, Adobe, and other apps and technologies as requested, online and in person.

### Meeting Scope Requirements (5.2.2)

#### Training Methods

**Interactive sessions** allow employees to follow along on their workstations, onsite *or* remotely, while watching the instructor’s display and asking questions as they learn.

**Lecture sessions** allow employees to “watch and learn” via the instructor’s display, allowing for them to practice on their own time after the lecture has ended.

#### Locations

**Onsite classes** will be held at your training facilities in Stockton.

**Remote classes** will be broadcast via Teams, Zoom, or Webex.

#### Class Size

This proposal is offered as a flat rate, regardless of the number of participants in any session. However, to ensure attendees have a positive experience, a maximum number of attendees is recommended:

	Interactive	Lecture
Onsite	18 Max	50 Max
Remote	30 Max	100 Max

Classes may also be limited based on the size of your training facility and network capabilities.

### Equipment and Technologies

For all onsite sessions, you will provide a workstation, projector, and screen for the instructor's use. It is recommended that you provide workstations (or laptops) for each of your participants or enough for them to pair up. All workstations will need to have Microsoft 365 installed, or access to a remote service. It is recommended that internet and network access be made available to the instructor and all participants. Sample files will be made available for training via email, USB, or network access prior to the class. You will also provide a parking permit.

For all remote sessions, you will provide a license for a delivery service such as Microsoft Teams.

For all sessions, you will provide an Microsoft 365 license at E3/G3 or higher for instructor's use. (Other classes, such as Power BI Service, may require additional licenses.)

### Class Dates, Duration, and Times

Your instructor is available for classes most days starting September 2025. When you are ready, we can compare calendars and select dates for training.

Most classes are full day (six hours). This proposal is priced for a specific number of hours of training, regardless of the number of classes.

### Materials

Materials provided include a class description, and may include additional handouts such as an agenda or "cheat sheets" to help attendees recall information they have learned after the class. They will be provided at no charge as PDFs which you may distribute via handouts and/or your intranet to attendees and other employees or printed using your resources.



### Attendance Reporting

Starting with this new contract, David will provide reports that summarize class attendance by topic and department, top attendees, top classes, number of learning hours, and other metrics including those gathered from the aforementioned survey. An hourly rate may apply for initial development.

### Class Schedule and Topics

Refer to the Course Listing (sent as an attachment) for available classes. Additional topics can be added upon request. If a requested topic requires the instructor to learn new material, an hourly rate may apply.

### Class Cancellation

Classes may be cancelled or rescheduled with 2 business days' notice, for any reason, and no charge will be incurred. Classes cancelled or rescheduled with less than 2 business days' notice will be charged for one (1) hour.

Likewise, this quote assumes no minimum and you are not required to schedule all available days/hours/classes to maintain the listed price.

### Best Practices (5.2.3)

To ensure the highest quality training experience, Applied Office adheres to pedagogical and information technology best practices that enhance engagement, retention, and application of knowledge. For instance,

- **Active Learning:** Most training sessions incorporate hands-on exercises, using real-world scenarios, with classroom discussions.
- **Customized Content:** Courses are tailored to meet the specific needs of the City, often specific to employees' departments and skill, ensuring relevance.
- **Feedback-Driven:** Immediate feedback from attendees and post-class surveys allows for continuous refinement of course content and delivery.

- Follow-Up Resources: Materials such as recorded sessions reinforce learning, reach more employees, and provide self-guided support on demand.

#### Quality Assurance (5.2.4)

Per our prior agreements, David launched a survey that all attendees are encouraged (and reminded) to complete after each class. The results and raw data of this survey are available to select City employees at any time.

As of March 10, 2025, KPIs from the [survey's 868 results](#) include:

9.76

Average Rating



Class Objectives were Clearly Stated

9.77

Average Rating



Class Objectives were Met or Exceeded

9.94

Average Rating



Trainer had a Thorough Knowledge of the Subject

9.90

Average Rating



Trainer Sufficiently Answered Questions

9.82

Average Rating



Trainer Kept the Class Moving  
at a Good Pace

9.93

Average Rating



Trainer was Positive, Helpful, and  
Encouraged Participation

## Consulting Services (Optional)

In addition to instructor-led training classes, this proposal offers additional services to be provided as determined by the City.

### Curriculum and Learning

David is available to assist in the authoring and editing of **learning assets** including, but not limited to:

- quick reference materials and other documentation
- presentations and videos
- SharePoint sites and pages that focus on training

David is also available to **consult on training lab design**, including room layout, hardware selection, software and technology integration, and lab policies to optimize the learning environment.

### One-on-One Assistance and Consulting

To help individuals and departments that need support beyond what the IT Help Desk can provide, David may assist with questions and projects related to Microsoft 365 including, but not limited to:

- spreadsheets, including templates and macros
- building and administering sites, libraries, and pages in SharePoint
- assistance maintaining Access databases

All requests under this heading require prior approval from the Technology Training Coordinator.

## Resume (Appendix A)

David Diskin is a certified **Microsoft Office "Master"** and works with small businesses and government agencies daily by helping them become more efficient with Microsoft Office. He has been using **Microsoft Office since 1995**, honing his skills in each application for "real world" use through training, consulting, and development.



David began training others on computer software in 1992 and has developed a reputation for being **patient** with all users yet **technically savvy** enough to impress power users. His delivery is **high-energy**, **clear**, and packed with **relevant examples** and **useful tips**.

Living in Lodi, CA, he spends much of his free time assisting non-profit organizations.

### Clients

David's clients include Blue Diamond Growers, Delta Health Systems, Adventist Health, Illumina, EDF Renewables, Grocery Outlet, the University of the Pacific, Cal-Waste Recovery, and many government agencies including the California Department of Justice and the City of Stockton.

### Skilled Areas

**Operating Systems:** All versions of Microsoft Windows from 3.1 to Windows 11.

**Applications:** Microsoft Word, Excel, Outlook, OneNote, Access, Publisher, Visio, PowerPoint, Project, Loop, Teams, Power BI, OneDrive, Power Automate, Forms, SharePoint, and many more.

**Other Skills:** Database design and implementation, public speaking, technical documentation, graphic and website design, social networking, video production, and photography.

### Certification

David possesses the following certificates:

- CompTia iNet+ Certification
- Microsoft Office User Specialist: Master
- Microsoft Certified Professional
- The Dale Carnegie Course



### Community Support

David is a proud supporter of the following:

- Breakthrough Project of Lodi
- World of Wonders Science Museum
- Museum of Science and Curiosity
- Harvest Home Animal Sanctuary

For 10 years, David also ran Leadership Lodi and is a graduate of both Leadership Lodi and Leadership Stockton.

## Attachment B - Proponent's Covenant

### ATTACHMENT B- PROPONENT'S COVENANT

In submitting this proposal, as herein described, the Proponent agrees that:

1. They have carefully examined the Scope of Work and all other provisions of this document and understand the meaning, intent, and requirements of same.
2. They will enter into contract negotiations and furnish the services specified.
3. They have signed and notarized the attached Non-Collusion Affidavit form, whether individual, corporate or partnership. Must be 'A Jurat' notarization.
4. They have reviewed and signed all clarifications/questions/answers on the City's website at [www.stocktonca.gov/itbid](http://www.stocktonca.gov/itbid).
5. Confidentiality: Successful Proponent hereby acknowledges that information provided by the City is personal and confidential and shall not be used for any purpose other than the original intent outlined in the Request for Proposal. Breach of confidentiality shall be just cause for immediate termination of contract agreement.

David Diskin dba Applied Office

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FIRM

PO Box 1582, Lodi CA 95241

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ADDRESS



March 11, 2025

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SIGNED BY & DATE

Owner

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TITLE OR AGENCY

209-610-0651

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PHONE/FAX NUMBER

david@AppliedOffice.net

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EMAIL

## Attachment C - Non-Collusion Affidavit

### ATTACHMENT C - NON-COLLUSION AFFIDAVIT

No. 1

#### AFFIDAVIT FOR INDIVIDUAL PROPONENT

STATE OF California, \_\_\_\_\_) ss.  
 County of San Joaquin \_\_\_\_\_)

(insert)

David Diskin being first duly sworn, deposes and says: That on behalf of any person not named herein; that said Proponent has not colluded, conspired, connived or agreed, directly or indirectly with, or induced or solicited any other bid or person, firm or corporation to put in a sham bid, or that such other person, firm or corporation shall or should refrain from bidding; and has not in any manner sought by collusion to secure to themselves any advantage over or against the City, or any person interested in said improvement, or over any other Proponent.

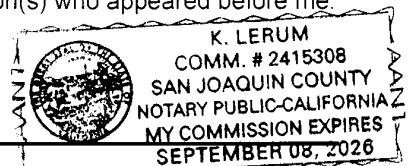
(Signature)  
 (Signature Individual Proponent)

Subscribed and sworn to (or affirmed) before me on this March 14, 2025

by David Diskin, proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

Seal \_\_\_\_\_

Signature K. Lerum



No. 2

#### AFFIDAVIT FOR CORPORATION PROPONENT

STATE OF \_\_\_\_\_, \_\_\_\_\_) ss.  
 County of \_\_\_\_\_)

(insert)

\_\_\_\_\_ being first duly sworn, deposes and says: That they are the \_\_\_\_\_ of \_\_\_\_\_ a corporation, which corporation is the party making the foregoing bid, that such bid is genuine and not sham or collusive, or made in the interest or behalf of any person not named herein; that said Proponent has not colluded, conspired, connived or agreed, directly or indirectly with, or induced or solicited any other bid or person, firm or corporation to put in a sham bid, or that such other person, firm or corporation shall or should refrain from bidding; and has not in any manner sought by collusion to secure to themselves any advantage over or against the City, or any person interested in said improvement, or over any other Proponent.

\_\_\_\_\_  
 (Signature Corporation Proponent)

Subscribed and sworn to (or affirmed) before me on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_, proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

Seal \_\_\_\_\_

Signature \_\_\_\_\_

## Attachment D - References

### ATTACHMENT D – AGENCY REFERENCE FORM PUR 25-024

Supply Three (3) References of Government Agencies and/or Firms for whom Bidder has provided similar Services during the last three (3) years:

#### LIST OF REFERENCES

<b>1. Agency or Firm Name:</b>	<b>City of Stockton</b>		
Location of the Service:	Stockton, CA and Online		
Contact Person and Title:	Clarise Tolentino		
Telephone:	(209) 937-7324		
Email Address:	clarise.tolentino@stocktonca.gov		
Description of Service:	IT Training and Consulting		
Date(s) When Service Provided:	August 2017 to Current		
<b>2. Agency or Firm Name:</b>	<b>City of Tracy</b>		
Location of the Service:	Online		
Contact Person and Title:	Norbert Ruijling		
Telephone:	(209) 831.6801		
Email Address:	norbert.ruijling@cityoftracy.org		
Description of Service:	IT Training and Consulting		
Date(s) When Service Provided:	November 2023 to Current		
<b>3. Agency or Firm Name:</b>	<b>City of Lathrop</b>		
Location of the Service:	Lathrop, CA and Online		
Contact Person and Title:	Juliana Burns		
Telephone:	209-941-7231		
Email Address:	jburns@ci.lathrop.ca.us		
Description of Service:	IT Training and Consulting		
Date(s) When Service Provided:	November 2019 to Current		

Signature and acknowledgment by signing below, I certify that I am authorized by the company named above to respond to this request.

Company/Firm Name	David Diskin dba Applied Office		
Address	PO Box 1582, Lodi, CA	Zip:	95241
Contact Name	David Diskin		
Email	david@AppliedOffice.net	Phone	209-610-0651
Fax	N/A	Signature	

## Attachment E - Financial Capacity

### ATTACHMENT E – CERTIFICATION OF FINANCIAL CONDITION

Solicitation #: PUR 25-024

Vendor Name: David Diskin dba Applied Office

The undersigned hereby certifies that: [check all applicable boxes]

☒ The Vendor is in sound financial condition and, if applicable, has received an unqualified audit opinion for the latest audit of its financial statements.

Date of latest audit: none (If no audit within past 18 months, explain reason below.)

Far too small to need an audit.

☒ The Vendor has no outstanding liabilities, including tax and judgment liens, to the Internal Revenue Service or any other government entity.

☒ The Vendor is current in all amounts due for payments of federal and state taxes and required employment-related contributions and withholdings.

☒ The Vendor is not the subject of any current litigation or findings of noncompliance under federal or state law.

☒ The Vendor has not been the subject of any past or current litigation, findings in any past litigation, or findings of noncompliance under federal or state law that may impact in any way its ability to fulfill the requirements of this Contract.

☒ He or she is authorized to make the foregoing statements on behalf of the Vendor.

Note: This shall constitute a continuing certification and Vendor shall notify the Contract Lead within 30 days of any material change to any of the representations made herein.

If any one or more of the foregoing boxes is NOT checked, Vendor shall explain the reason(s) in the space below. Failure to include an explanation may result in Vendor being deemed non-responsive and its submission rejected in its entirety.

Signature: 

Date: March 11, 2025

Printed Name: David Diskin

Title: Owner



## Attachment F - Price Sheet

Per RFP requirements, this has been provided as a separate attachment.

## Attachment G - Subcontractors

### ATTACHMENT G - SUBCONTRACTOR LIST PUR 25-024

PLEASE LIST BELOW ALL SUBCONTRACTORS CONTRIBUTING TO THIS WORK

Each bidder shall give the name, business address, license number, description of the work, and the dollar amount to be PAID the subcontractor, for each subcontractor that will be used on the project, if the Bidder is awarded the contract. Only subcontractors with work in excess of one-half of one percent (0.5%) or \$10,000 (whichever is greater) of the Bidder's total bid need to be listed. All work in excess of one-half of one percent (0.5%) or \$10,000 (whichever is greater) of the Bidder's total bid, for which a subcontractor is not listed on this form, shall be performed by the Bidder's own organization. Additional numbered pages listing proposed subcontractors may be attached to this page. Each page shall be headed "Proposed Subcontractors" and shall be signed by the Bidder.

PRINT LEGIBLY OR TYPE

BUSINESS NAME/ADDRESS	CONTACT	PHONE NUMBER	LICENSE NUMBER & LICENSE CLASSIFICATION	TYPE OF WORK	AMOUNT
None					

**Attachment H - Exceptions****ATTACHMENT H - EXCEPTIONS  
PUR 25-024**

None

## Conclusion

Thank you for allowing me to present this proposal. Please keep in mind that many aspects of this proposal can be tailored to your specific needs.

Sincerely,

A handwritten signature in dark ink, appearing to read 'D. Diskin', with a stylized flourish at the end.

David Diskin, Applied Office

209-610-0651

david@appliedoffice.net