# Workshop Objectives

and proficiency in procurement, contract standards, policies and procedures

of procurement and contracting process

of both the department and the purchasing staff during a procurement process

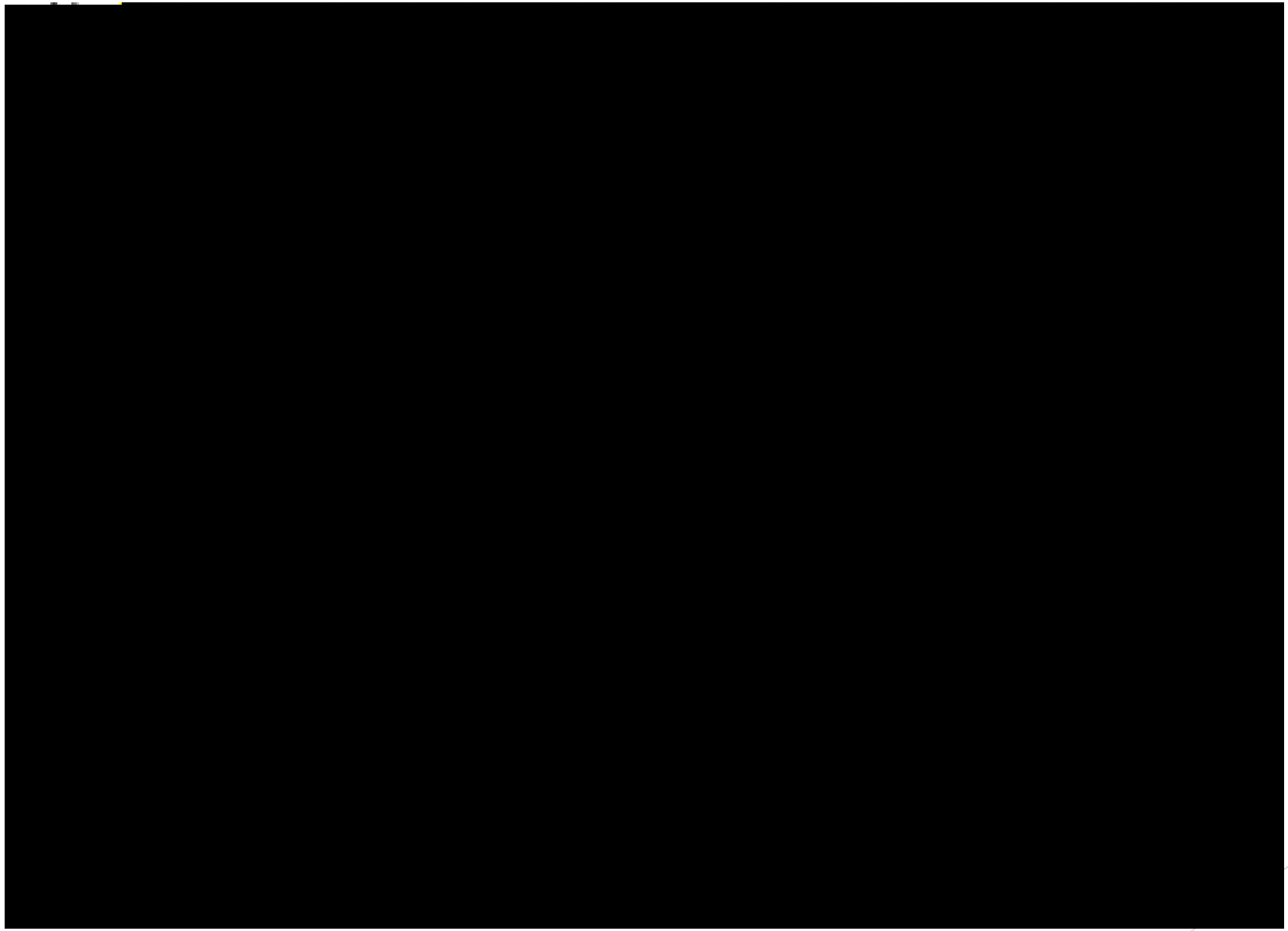
# What is Procurement?

Procurement is the function of obtaining necessary commodities and services required by departments to carry out the university's mission.

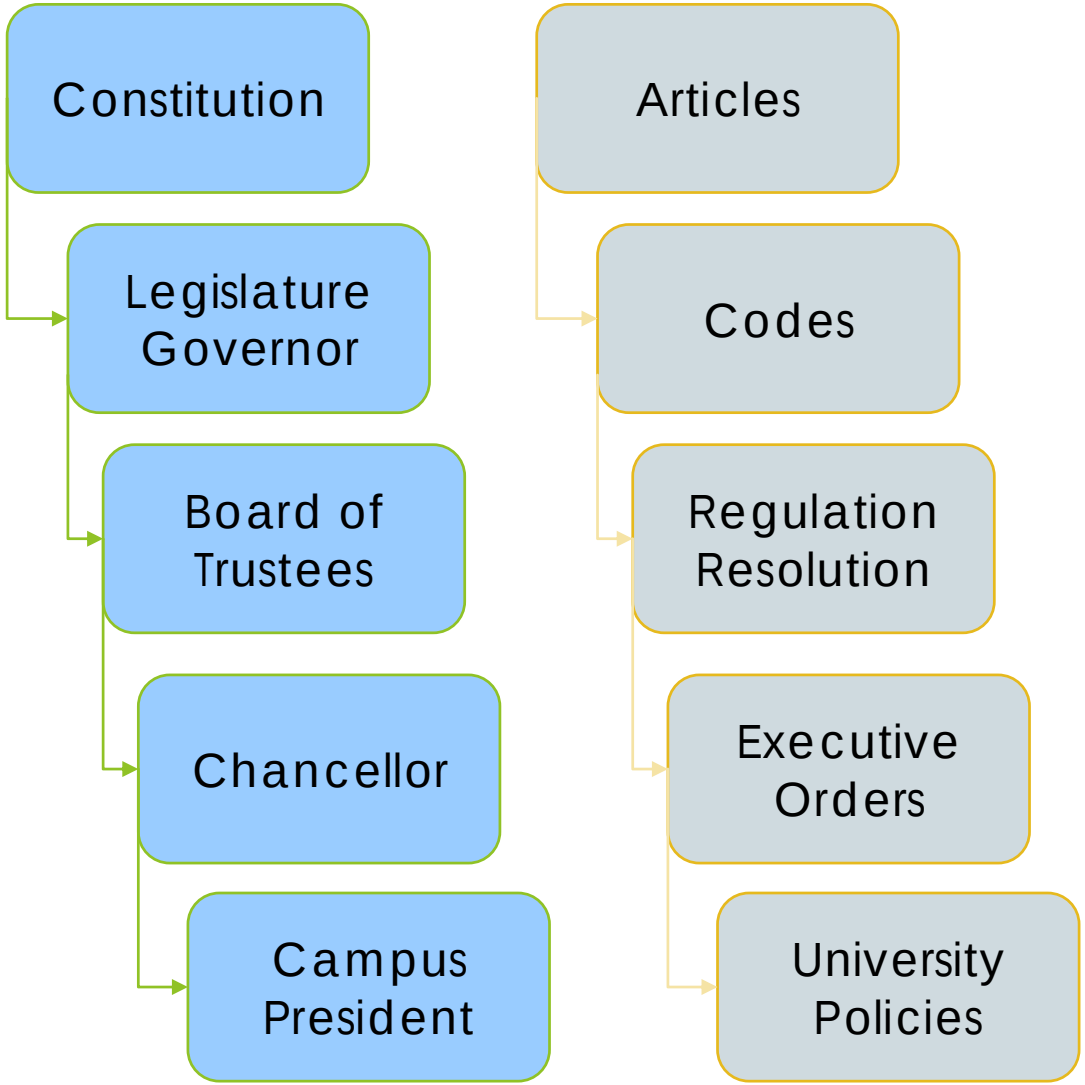
# Planning is Key

- Better business decision-making
- Opportunity to consolidate requirements
- Combine budget process with procurement planning
- Allows the best procurement methodology
- Tip: Reach out to Procurement early, when the need is conceived

# CSU Policy Manual for Contracting & Procurement



# Delegation of Authority



# What is a Requisition ?

A requisition is a request to the Procurement Office to make a purchase

Requisition types:

- Commodity
- Service

# Requisition

Must include:

- Description of goods/services
- Statement of Work/Quote
- All support documentation
- Must be approved and budget checked

# Requisition for Service require the following:

- Description of service required.
- Type of equipment, model and serial number

# Insurance Requirements for Services:

Minimum Requirements:

- General Liability
- Business Automobile Liability,
- Workers Compensation

# Services : < $50K

Quote
Fair and Reasonable determination
Statement of Work
Secured by Purchase Order or Contract

# Services: > $50K

Formal

Advertised

DVBE/SBE outreach

Invitation For Bid (IFB)

Request For Proposal (RFP)

Cooperative Agreement / Contract

Secured by Contract

The use of written requests for bids/proposals is required.

# Competitive Solicitation: > $50K

Formal

Advertised

SB/DVBE outreach

IFB – Lowest responsive and responsible

RFP – Most qualified responsive and responsible

# Solicitation Types

# Common Solicitation Types

Invitation for Bid (IFB)

# IFB vs. RFP

## IFB

- Clearly defined specifications
- No qualitative factors
- No discussions or negotiations needed
- Award to _____ responsive and responsible bidder

## RFP

- Consideration of factors other than price
- Discussions/ negotiations anticipated
- Award to _____ responsive and responsible proposer

# Sole Brand/Sole Source

## Sole Brand

A specific product /service required and can be provided by multiple resellers.

## Sole Source

Contractor/vendor is the only one that can provide product or service.

# Sole Brand/Sole Source

Justification:

- Written
- Must be submitted by the using department prior to purchase
- Must be approved by the Director of Procurement prior to purchase.

# What is a Contract?

An agreement enforceable by law between two or more competent parties to do or not to do something not prohibited by law, for a legal consideration.

# Legal Elements of a Contract

An Offer

An Acceptance in strict compliance with the terms of the offer

Legal Purpose/Objective

Mutuality of Obligation

Consideration

Competent Parties

# Purchasing Department Responsibilities

- RFQ/RFP Solicitation
- Contract Management & Administration
- Contract dispute resolution
- Develop, implement and maintain policies and procedures

# Requesting Department Responsibilities

Engage Purchasing Early

Plan & Anticipate Requirements

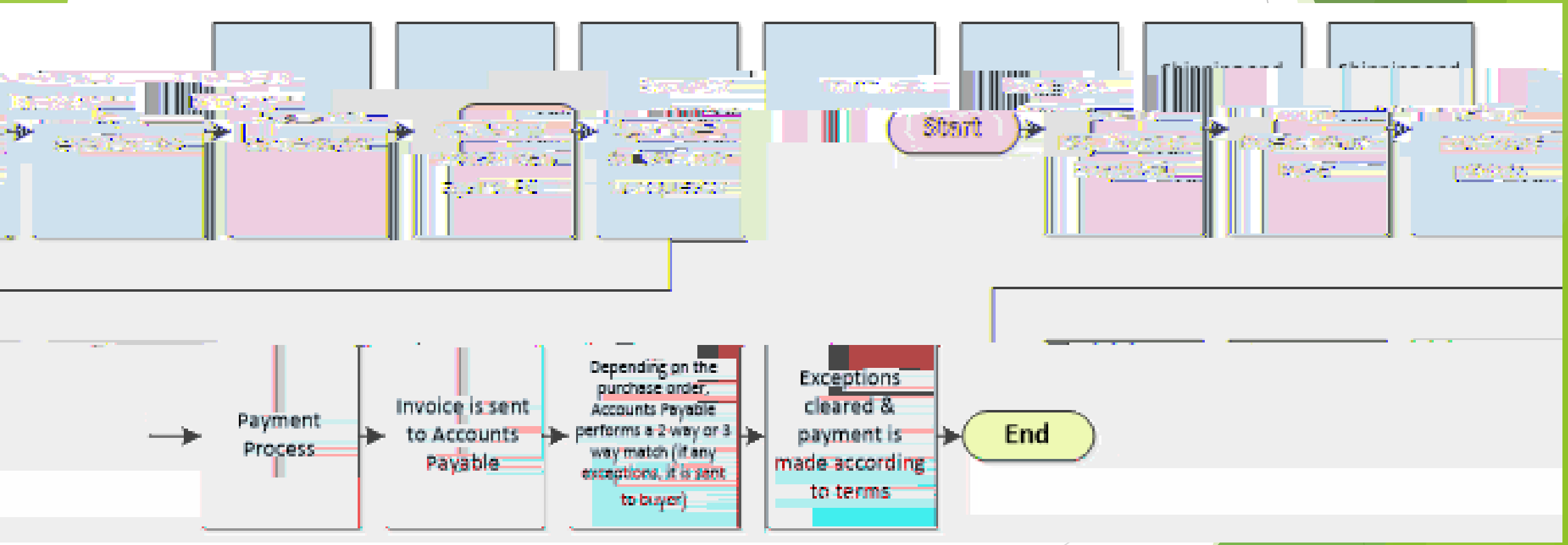
Adhere to Purchasing Procedures & Policies

Provide Clear & Precise Specifications (SOW)

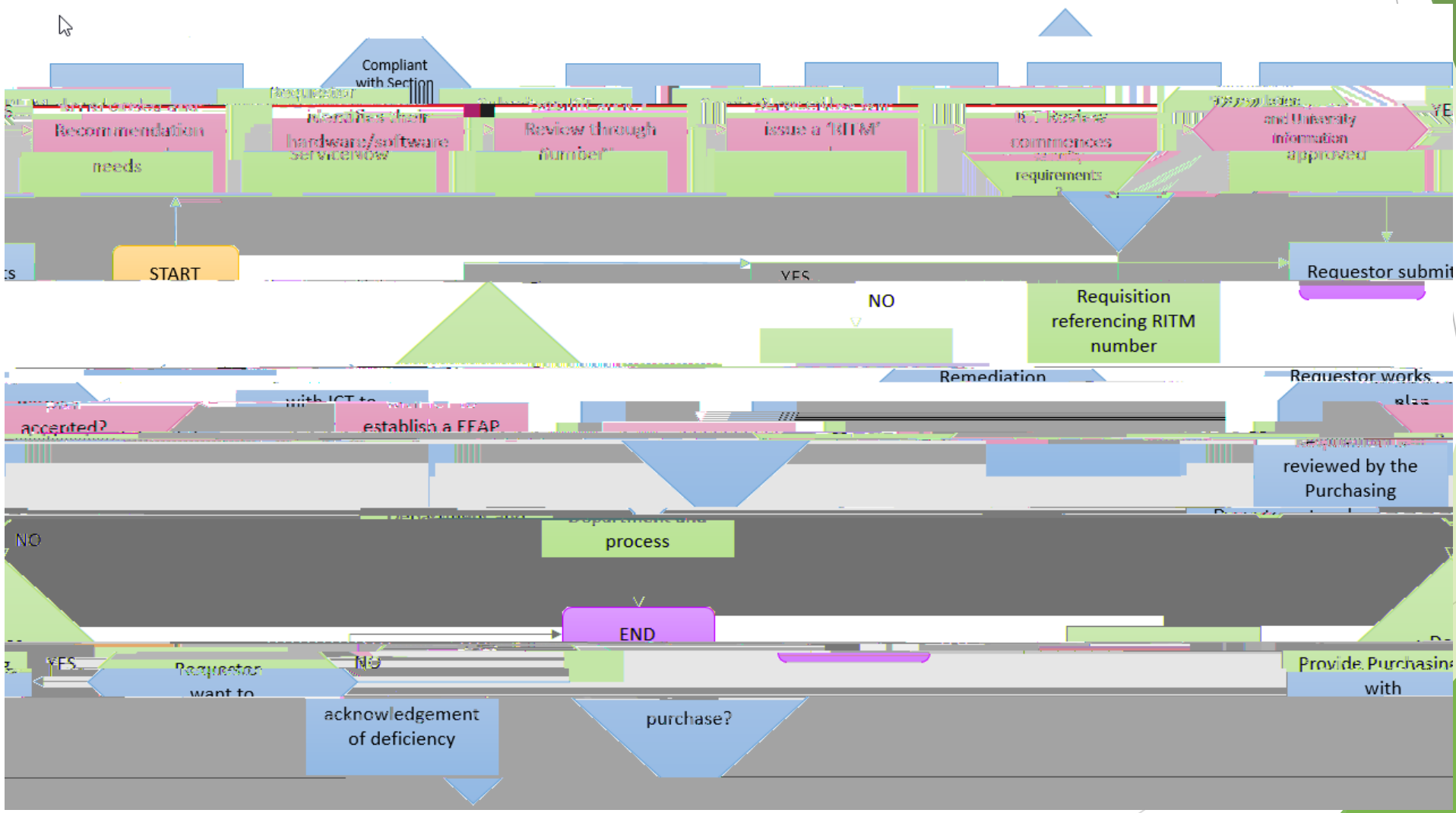
# Statement of Work (SOW) ð Provided by Requester

- Defines the obligation of the contractor
- Written in plain and precise language
- Establishes requirements
- Should address the desired end result
- SOW should contain deliverables & timeline

# PROCUREMENT PROCESS



# ICT Process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# Wrap Up

What questions do you still have?

What topics would you like to see explored in the future?

# Thank you