• Procurement Issues
• ICT Process
• Federal Work Study
• Announcements
PROCUREMENT ISSUES
Software and Hardware Procurements

• ICTs are required for most software unless pre-approved and listed on the ICT Website.

• Software and Hardware purchases need to be procured through a requisition and PO process after the ICT has been approved.

• Software agreements, by and large, are written on vendor “paper” and need to be negotiated, to include CSU General Provisions.
Involving Procurement Early

- Involve the Procurement office early on in the process; criteria's to consider:
  - Procurement strategy
  - timelines, vendors
  - small business
  - disadvantaged veteran business outreach

- The Procurement Office can ascertain if the best path forward:
  - Request for Proposals (RFP),
  - cooperative contracts
  - Master Enabling Agreement (MEA)

- Procurement lead times need to be realistic with forethought allowing for delays
Unauthorized Purchases

• Delegation of Authority—Procurement is the only department @CSUEB allow to commit funds on behalf of the University

• It is not acceptable to commit funds outside of the established process

• Doing so may invoke the following

  • Unauthorized Purchase Request
  • A PO will not be created for an after the fact order
  • Payment for an unapproved purchase must be made through a Request for Check

• Unauthorized purchases can be easily avoided by communicating with the Procurement Office early in the process.
Blanket Order & Change Orders

- Make sure to monitor your POs:
  - Amounts spent should not exceed the amount authorized on the PO
  - Submit a change order if the PO threshold is fully spent
  - Do not wait to the last minute

- Please remember to review/manage your PO balances at least monthly

- You may close out any unused amount on a PO at any point during the fiscal year
Web Sites Policies.

- Become familiar with the P–Card Policy. Know what you can and can’t do with your P–Card. Know what is prohibited. Please refer to: Viewing P–Card Policy :: PolicyStat

- Know when you need to fill out a Hospitality Form and become familiar with the Hospitality Policy. Please refer to: Viewing CSUEB Hospitality Policy :: PolicyStat
What are the two kinds of procurements that could trigger the need for an ICT review?
Answer #1

Software and computer hardware
Question #2

The administration and Finance Vice President has to review every Unauthorized Purchase Request Form. True or False?
Answer #2

True.
Question #3

When is the best time to review blanket PO activity and available balances?

A. After breakfast.
B. In June of each fiscal year.
C. Monthly
D. Quarterly
C. Monthly
Questions & Answers
~ ICT Review Process ~
Documenting procurement requirements for Accessible Electronic and Information Technology
www.csueastbay.edu/ict

Thomas Dixon
ITS
Objectives

• Have a functional understanding of VPAT & Information Security (IS) requirements.

• Why are VPAT & IS important to CSUEB.

• Know the key elements of VPAT & IS reviews.
• CSU policy - make information technology resources and services accessible to all CSU students, faculty, staff, and the general public regardless of disability.

• A shared responsibility for the campus per CSUEB President’s January 4, 2017 Communique.

• In 1973, Congress amended the Rehabilitation Act to include Section 508

• Section 508 is procurement law to assess all Information & Communication Technology (ICT) acquisitions
Why Must The CSU Comply With Section 508?

- Access
- Inclusion
- Bottom Line: Critical for Student Success
Roles & Responsibilities

- Purchasing Department
- Accessibility Services
- Information Security Office
- Any university department making an IT related acquisition
Categories of products and services identified under Section 508:

Electronic & Web
* Websites and web-based content
* Multimedia
* Subscription services

Software
* Web, desktop, server, mobile client applications
* Authoring tools
* Operating Systems
* Systems/network administration, and remote access software
* Virtual meeting tools (e.g., VOIP, screen shares, remote meetings)

Support Documentation & Services
* Training Services
* Help Desk or call center
* Automated self-service & technical support
* Product documentation

Hardware
* Desktop & portable computers (including mobile devices)
* Servers
* Printers/copiers and Document scanners (including Multi-function office machines)
* Information kiosks and transaction machines
Examples of Products that DO NOT Require a Review

• Computer mice
• Computer keyboard (when purchased alone)
• Flash drives
• Hard drives
• Power supplies and batteries
• Installation equipment (e.g., wall mounts, mounting brackets, cables)
Compliance

- No product can claim 100% compliance.

- The **degree** of compliance must be evaluated.

- The Federal Government mandates that Agencies must “procure the product that best meets the standards.”
Compliance

Products must provide access to:

- Visual
  - Blindness, low vision, color-blindness
- Hearing
- Motor /Mobility
- Neurological
What if a Vendor is Non-Compliant?

- Vendor generates an Accessibility roadmap
  and/or
- Requestor (SME) generates Equally Effective Alternate Access Plan (EEAAP) submit if there is not Accessibility Roadmap.
  - Collaboration with IT, Procurement, AS and requesting Department.
What purchases are subject to IS review?

- Any purchase or contract that utilizes or collects University data.

- These are generally IT related.

- An IS review is also required for any non-IT contract that shares University data with an outside entity.

Examples: fundraising partners, healthcare providers or survey facilitators.
IS Reviews are not required for...

- Purchasing commodity goods such as computer hardware or software licenses.

- Except...when used as part of a process or project that will utilize or collect University data.
The CSU procurement requirements have three general provisions related to IS for Service or Information Technology Acquisitions:

1. Use of Data
2. Confidentiality of Data
3. Information Security Requirements
Use of Data

- Campus must ensure vendors use University data only in the manner expected. Any changes to use must be authorized in writing by the University.

- Campus must ensure that contracts include language which requires vendors to comply with CSU Information Security Requirements in order to protect University data.

- These requirements are enforced even after a contract expires.
Confidentiality of Data

• Campus must ensure that contracts include an acknowledgement by vendors of the privacy rights of individuals and their responsibility to protect those rights.

• These requirements are spelled out in state and federal law, including FERPA and the California Information Practices Act.
General Steps of an IS review

• Perform verification that vendor meets IS requirements.

• Inform requestor of any risks to the University.

• Suggest possible mitigations for any unresolved risks.
Resources

• ICT Website
  https://www.csueastbay.edu/ict/index.html

• CSU Product Accessibility Documentation Guidelines:
  • https://www.calstate.edu/Accessibility/EIT_Procurement/CSUProductAccessibilityDocumentationGuidelines.doc

• CSU East Bay’s Information Technology Services has several policy and guideline documents:
  • https://www.csueastbay.edu/its
Question #1

Who is responsible for filling out an ICT?
Any University department making an IT related acquisition.
Question #2

Which product does not require an ICT Review?
A. New system for collecting library fines.
B. Annual renewal for document imaging system
C. Logitech mouse
D. Contract to provide tutoring services online for students.
Answer #2

C. Logitech mouse
Question #3

Which step is NOT part of an information security review?
A. Preform verification that a vendor meets IS requirements.
B. Inform requestor of any risks to the University.
C. The ISO posts the results of the security review on Instagram.
D. Suggest possible mitigations for any unresolved risks.
Answer #3

C. ISO does not have an Instagram account. 😊
Questions & Answers
Federal Work Study

Office of Financial Aid & Scholarships
Sonia Jethani
Federal Work-Study (FWS) is a form of financial aid largely provided by federal funding. A student must apply for financial aid each year to become eligible for the award, or to keep working in their current Work-Study job. Eligible FWS students earn money by working a limited number of hours per week at a pre-approved FWS site location. Employment may be found on or off-campus with employers that have arranged in advance to offer FWS positions to CSUEB students. Students must be enrolled at least half-time (6 units or more), actively attending in said classes and maintain Satisfactory Academic Progress (SAP) to retain eligibility for their FWS job.
Federal Work Study Workflow (FA and Accounting) Draft v.1

FWS Involves Many Departments and is Closely Monitored and Strictly Regulated by the Department of Education

Notes:
1. AAC: Academic Advising & Career Education
2. LC: Labor Cost Distribution
3. AP: Accounts Payable
4. GL: General Ledger
5. SEFA: Schedule of Expenditures of Federal Awards (Prepared by Accounting)

Rev. 12/20/2014
FWS FAQs

- Will FWS pay the entire salary? No. Departments are responsible for 25% of the student’s total salary.
- How do I know if an applicant is eligible for FWS? Please confirm so with the student – they have access to view whether they were awarded FWS by logging in to [https://www.csueastbay.edu/mycsueb/](https://www.csueastbay.edu/mycsueb/)
- Can I ask the Financial Aid office for a list of FWS eligible students? Due to Federal Student Aid (FSA) guidelines, we are not allowed to share this information. We recommend you reach out to the student directly to confirm if they have been awarded the fund.
- How much can a student earn in FWS during an academic year? The maximum FWS award is for $3,000, however the amount awarded varies by student. Please work closely with the student to ensure they do not exceed the allotted amount, as this may result in a reduction of their financial aid.
FWS FAQs

- How many hours can a student work?
The maximum allowed is 20 hours per week, 8 hours per day (this includes all on-campus jobs).

- Can FWS be used to pay the student sick leave or holidays?
A school is not permitted to use either the federal funds to provide fringe benefits such as sick leave, vacation pay, or holiday pay, or employer’s contributions to Social Security, workers’ compensation, retirement, or any other welfare or insurance program.
Does FWS affect a student’s eligibility for other awarded scholarships?
FWS does not affect the student's eligibility to receive their other awarded scholarships unless the student is awarded up to their Cost of Attendance (COA) or ‘need,’ as determined by their FAFSA. In that instance, Financial Aid would adjust other aid awarded to make room for the scholarship.

Who can I contact if I have specific questions about the FWS program?
Lucretia Whitener is the FWS Coordinator and can be reached at lucretia.whitener@csueastbay.edu (for staff) or finaid@csueastbay.edu (for students)
Sample Federal Work Study Form

Student First Name: ____________________________

Student Last Name: ____________________________

Net ID: ___________ Position: ______________________

Federal Work Study Amount: ________________________________

Working Elsewhere On Campus? (list location & amount of hours)  □ Yes □ No

______________________________

Student Agreements
I understand that the University Department will work with the Financial Aid Office on campus in order to coordinate the usage of my Federal Work Study funds for this position and that I am only to work for a maximum of 20 hours a week. Upon completion or disqualification of my Federal Work Study Funds, my continued wages will be paid through the University Department’s budget.

Confirm Understanding: □ Yes Confirm Agreement: □ Yes

______________________________

Signature

______________________________

Date

Questions About This Form Can Be Directed To The Office of Financial Aid and Scholarships
Johnny lives on campus with a $23,000 budget. Below are his amounts and sources of aid.

If Johnny were to receive an outside scholarship of $1,000, his Federal Work Study would be reduced to $1,400. Johnny would be required by law to repay the $1,000 back to the university in order for his outside scholarship to be accommodated. His other option is to request to reduce his loans early in the year (i.e. fall or winter) to avoid having to repay any funds.

<table>
<thead>
<tr>
<th>Amount</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,775</td>
<td>Pell Grant</td>
</tr>
<tr>
<td>$5,472</td>
<td>Cal Grant (CG) B</td>
</tr>
<tr>
<td>$1,656</td>
<td>Cal Grant B Access</td>
</tr>
<tr>
<td>$2,400</td>
<td>Federal Work Study (FWS)</td>
</tr>
<tr>
<td>$5,500</td>
<td>Subsidized Loan</td>
</tr>
<tr>
<td>$2,197</td>
<td>Unsubsidized Loan</td>
</tr>
<tr>
<td>$23,000</td>
<td>TOTAL AID</td>
</tr>
</tbody>
</table>
Employer Tips

- **Review the employer guidance on our Federal Work Study Website**

- Reach out to your Division Budget Director to determine the amount that your department has been allotted:
  
  Each year, divisions are provided with Federal Work Study Allocations based on average 5 year expenditure on Student Assistants. It is the responsibility of each employer to monitor their FWS spending. Any overages will be charged to your department budget.
Can I ask the Financial Aid Office for a list of FWS eligible students?
No. This would be out of compliance. You must ask the student.
Question #2

Will FWS pay the entire salary?
Answer #2

No. 25% is from the department budget.
Question #3

How many hours can a student work?
Answer #3

20 hours a week, maximum.
Questions & Answers
Announcements
Managed Print Services

Support Services
Nickolas Meixner
Managed Print Services Program

• All inclusive print management program (toner, paper, maintenance, setup/configuration, repairs/replacement).

• Departments purchase a device from a variety of options that best fit their operational needs.

• Minimal cost per page to cover “All inclusive” items.

• Departments need only contact Support Services for anything printer related for the life of the agreement.
Managed Print Services Program

• **Standardization** (currently hundreds of printer models on campus).

• **Cost Savings** ($50,000 in unused toners, unfixed printers).

• **Centralized Support** (100% Support Services covered program for the life of the agreement).