

# Procurement 101

September 6, 2023 | 9:00 - 11:30 AM

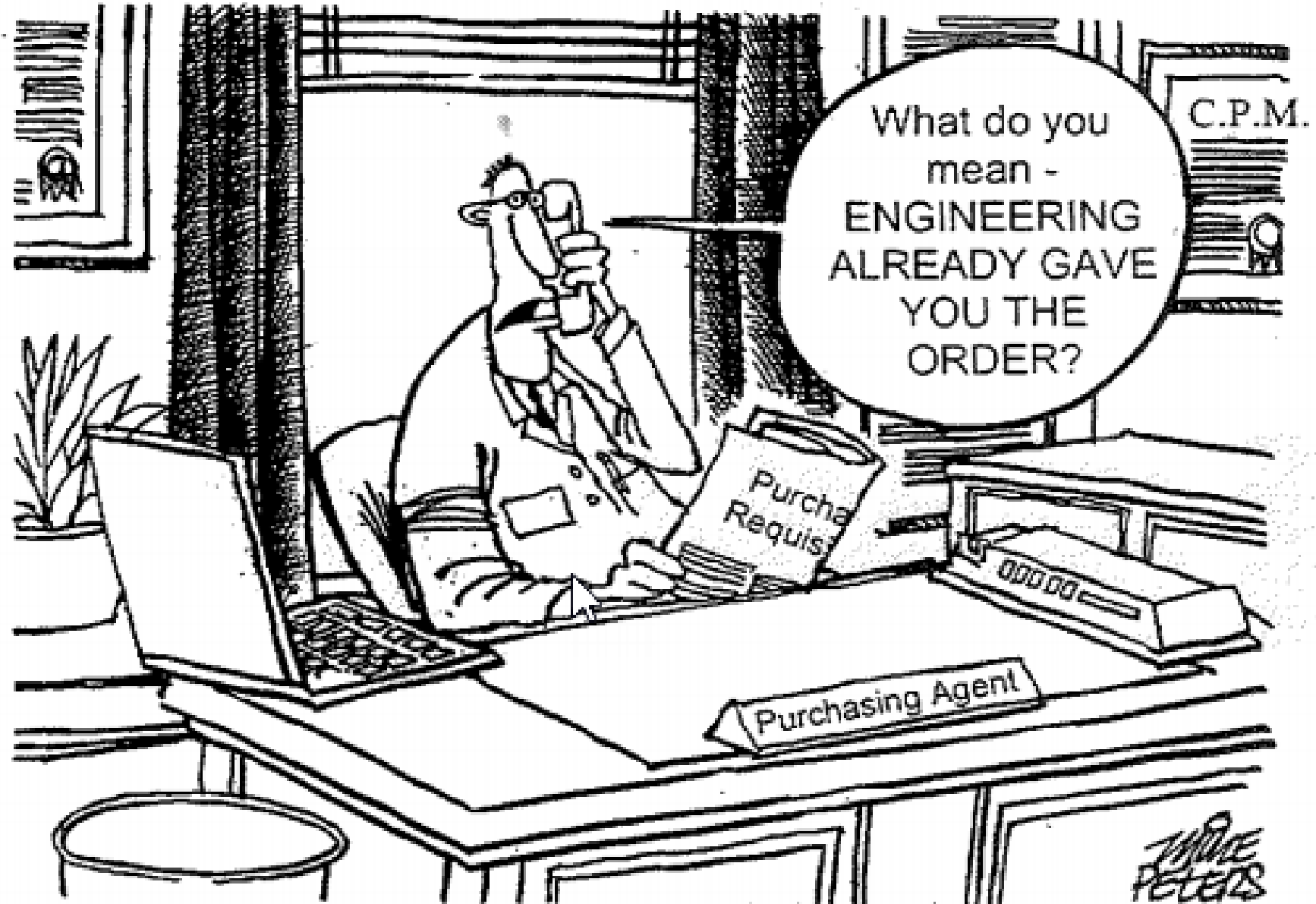


# Presenters: Procurement Services Team

- **Sai Vang**, Procurement Director
- **Chris Lam-Vazquez**, Lead/Contracts Administrator
  - Public Works contract
  - Facilities Development & Operations (FD&O)
  - Misc. contracts
- **Thomas Ballinger**, Contracts Administrator
  - Software Licenses
  - Misc. contracts
- **Diego Campos**, Buyer II
  - IT hardware
  - Misc. commodities
  - ASI Department
  - University Police Department & Transportation
- **Bhavesh Patel**, Buyer II
  - Athletics Department
  - The College of Science
  - CSUBUY
  - Misc. commodities

# Agenda

- Overview of Purchasing Process
- Policies and Procedures Governing Procurement
- Roles and Responsibilities of Procurement and the Campus Community



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# About Us

## Procurement Services . . .

- supports the University to obtain the necessary commodities (tangible goods) and/or services
- supports the University through the purchasing process while ensuring compliance with policies and procedures
- has delegated authority to issue purchase orders and award contracts on behalf of the University

# Procurement Objective

The primary responsibility for Procurement is to comply with California state and CSU policies and adhere to general principles such as making reasonable efforts to ensure the campus community and vendors are aware, adhering to a defined process, and collecting appropriate documentation.

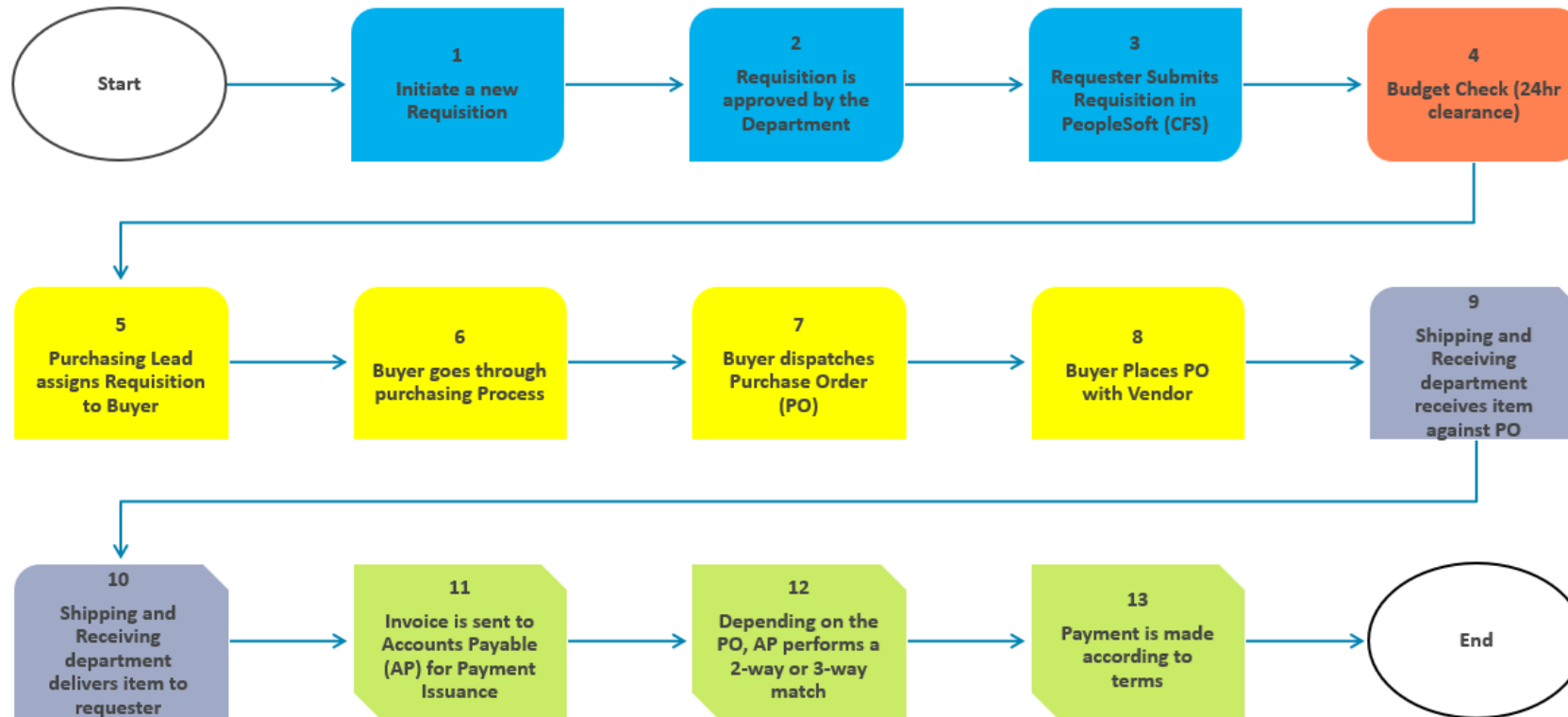
# The Procurement Process is designed to:

Ensure fair and open competition:

- Guard against favoritism, improvidence, extravagances, fraud and corruption;
- Ensure that the results meet University needs;
- Provide for checks and balances to regulate and oversee University Procurement activities; and
- Protect the interests of the State and its taxpayers

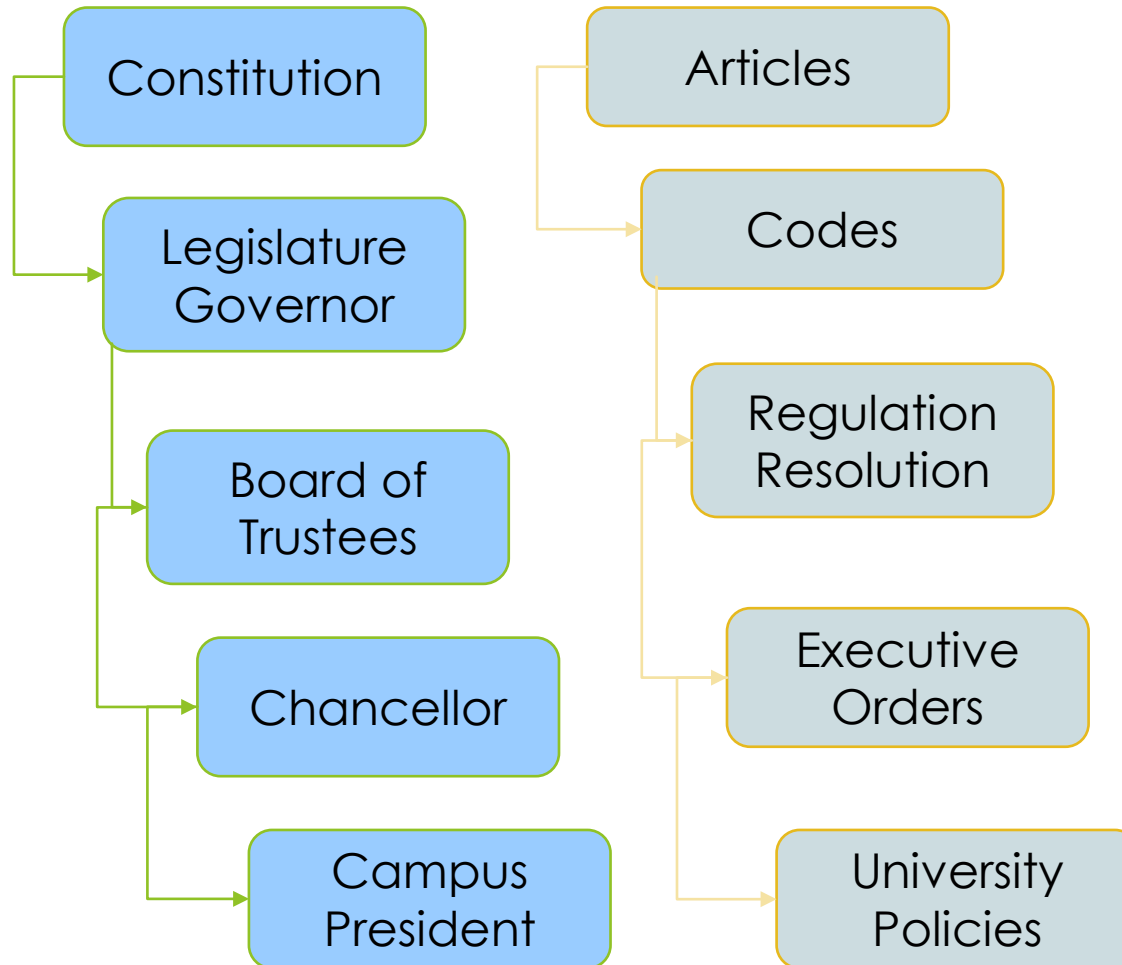
# PROCUREMENT PROCESS

## Requisition to Purchase Order Process





# Delegation of Authority



<https://csueastbay.policystat.com/policy/12254384/latest>

# Competition Thresholds, < \$50,000

- Competition is Not Required by CSU Policy
- Quote/Proposal
- Statement of Work
- Purchase Order or Contract

# **Good or Services, \$50,000 - \$100,000**

## **ITR \$50,000 - \$500,000**

- Informal
- Quote/Proposal from at Least 3 Vendors
- DVBE/SB Outreach Recommended
- Cooperative Agreement/Master Enabling Agreement
- Purchase Order or Contract

# **Good or Services \$100,000+ ITR \$500,000+**

- Formal Solicitation
- Advertised
- Bid Opening
- DVBE/SB Required Unless Waived
- Invitation for Bid (IFB) Lowest responsive and responsible
- Request for Proposals (RFP) Most qualified responsive and responsible



## **5-Minute Question & Answer Time**

Please raise your hand or type in your question in the comment box.

# Things for department to consider

## Considerations:

- 1) Bid thresholds
- 2) Bid Exceptions
  - A. MEAs
  - B. *Other Piggyback Agreements*
- 1) Existing vendor vs New Vendor (VDR)
- 2) IT software and equipment
  - A. ICT Review
- 1) Other methods: p-card, blanket PO, CSU Buy, STLS

**\*\*\*Engage Procurement at the start of the process\*\*\***

# What is a Requisition ?

- A requisition is a request from a University Department to the Procurement Office to make a purchase
- It is entered in PeopleSoft CMS
- Requisition may be for:
  - Commodity
  - Service
- Is it a request to pay a supplier?

# Department Requisitions

- User's guide "how to submit requisition in Peoplesoft"
- Who can enter?
- Include required documents



# **Requisition is approved by Department's Fiscal DOA to commit funds for the purchase**

Fiscal DOA - determined internally but provides the Procurement Department the approval to proceed with the acquisition.

# Requisition for Service require the following:

- Description of service required
- Statement of Work
- Vendor's Proposals
- Period of Service: Is the order for a one-time service or repeat service?
- Provide a list of who is authorized to request service.

***All service requisitions must have appropriate insurance on file before the service order can be released.***

# Requisition for Commodities require the following:

- Detailed description of goods/services requested
- Specific Identifiers, Part numbers, model
- Quote or Proposal
- Supporting documentation like emails from supplier

# Requisition Timeline / Steps

- One business day to Budget Check - After DOA approval
- Requisition gets assigned to a Buyer
- Turnaround time depends on thoroughness and complexity
- Bid threshold - does it require bidding? procedure to be followed
- Commodity or service
- An incomplete requisition

# Requisition Process

- Requisition is assigned to the appropriate buyer
- Buyer processes requisition to a Purchase Order
- Buyer issues/dispatches Purchase Order

# Change Order Request



## Change Order Request

Request a change to an existing Purchase Order.

Requestor Name: \_\_\_\_\_ Today's Date: Aug 31, 2023

### Purchase Order Information

Purchase Order ID/Number: \_\_\_\_\_  
Contractor/Vendor Name: \_\_\_\_\_  
Buyer: Chris Lam-Vazquez Email Address: chris.lam-vazquez@csueastbay.edu

### Change Order Information

Change Order Number: 1

1. Line Number: 3


- Reason for change (multiple selection options):

- Increase cost by \_\_\_\_\_
- Decrease cost by \$27,000.00
- Account field \_\_\_\_\_
- Term duration \_\_\_\_\_
- Product or Service \_\_\_\_\_
- Other \_\_\_\_\_

2. Line Number: 2

- Reason for change (multiple selection options):

- Increase cost by \$27,000.00
- Decrease cost by \_\_\_\_\_
- Account field \_\_\_\_\_
- Term duration \_\_\_\_\_
- Product or Service \_\_\_\_\_
- Other \_\_\_\_\_

Attach revised Quote/Proposal or other supporting documentation: 

I have the fiscal delegation of authority to approve this change order request.

Fiscal Delegation of Authority Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: 08/31/23

# 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 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



# Software Related Purchases (ICT Process)

- All software related purchases including renewals of existing software must be made by the Procurement Office unless the Director of Procurement grants approval to acquire/purchase another way.
- Never sign anything without the approval of Procurement. If a vendor asks you to sign anything forward it to Procurement immediately for review.
- Before any software related agreement can be signed or renewed the product must complete the ICT review process which reviews for Accessibility and Information Security,

# ICT Review

- After the ICT review has been completed with an affirmative recommendation an ICT number will be issued to the requestor.
- After the ICT number has been issued a requisition can be entered and sent to Procurement
- Requests for review can be submitted to IT via:  
<https://www.csueastbay.edu/ict/index.html>

# Things to Remember Regarding Software Related Products

- No Purchase for Money
- No Zero Dollar Purchases
- No Gifts of Software
- No Free Trials
- No P-Card Purchases
- No Reimbursements
- No Purchases Through a Vendor Website (click-through) or APP



## **5-Minute Question & Answer Time**

Please raise your hand or type in your question in the comment box.

# What is CSUBUY?

- CSUBUY is the first step in transforming the way the CSU manages the Procure-to-Pay process. This change creates a foundation for future implementation of automated workflow, requisitioning, purchase orders, and AP functionality through integration into CFS (Common Financial System) and Oracle.
- The Campus Marketplace is a collection of supplier catalogs with CSU contracted pricing. The marketplace provides P-Card users discounted pricing and suppliers a trade portal for selling their product through a "Supplier Hosted Catalog."

# CSUBUY - Supplier Catalogs

CSUBUY

All Search (Alt+Q) 0.00 USD

Shop • Shopping Home Page

### Showcases

GENERAL

- amazon business
- Complete Book
- School Specialty
- STAPLES

INFORMATION TECHNOLOGY

- B&H
- CDWG
- Connection
- DELL
- hp
- irg
- shi SHI
- Staples

FACILITIES MANAGEMENT

- FIRSTENAL
- GRAINGER
- CONCRETE SOLUTIONS CA SB
- Graybar
- WAXIE
- WESCO
- BLACK & VEATCH GRAINGER CA DVBE, SB
- LOWE'S

LABORATORY & SCIENTIFIC, MEDICAL & ATHLETIC

- CAROLINA
- Fisher Scientific
- RENY SCIENTIFIC
- ALCANTARA
- MILUPRO SIGMA No CSU Contract (list price)
- VWR
- NETA SCIENTIFIC WBENC, MWBE, SBE, SAM
- Pocket Nurse
- Thomas Scientific

# CSUBUY - How to access and purchase?

CSUBUY is available to all CSUEB employees, all of whom will receive the Shopper role. If you want to be able to check out with a P-Card, then you will need to contact Bhavesh Patel or Chris Lam-Vazquez to update your role to a Requester role.

**How to Guide for End Users:**

**<https://www.csueastbay.edu/procurement/files/docs/purchasing/csubuy-end-user-training-guide.pdf>**

# Responsibilities



# Procurement Department Responsibilities

- RFQ/RFP Solicitation
- 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)
- Contract Management

# Departments Are Not Authorized To:

- Make a purchase or contract a service without an approved purchase order
- Sign any contractual agreement, i.e., license agreement, MOUs (Memorandum of Understanding), CSU Agreement
- Pick up merchandise without an approved CSUEB issued purchase order
- Unilaterally cancel/make change(s) to a CSUEB issued purchase order

# Statement of Work (SOW) – 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

***Suggested Format for STATEMENT OF WORK***

# Advisory:

## Small business/DVBE

The State of California is committed to helping small, diverse and disabled veteran businesses thrive.

Requirement for all State Entities:

### DVBE:

- DVBE (Disabled Veteran Business Enterprise)-certified by DGS
- Required 3% commitment of CSUEB total spending

### Small Business:

- Certified by DGS
- Required 25% commitment of CSUEB total spending
- Include Small Business, Microbusiness, and SB-PW (new)

# Reminder:

## Closing Inactive Purchase Orders

- Departments to review their Open Purchase Order Report regularly
- Identify inactive purchase orders
- Submit a close of purchase order request to the respective buyers
  - List the purchase orders in numerical order

# Procurement Office Hours



Every other Thursday from  
1:00 - 2:00PM

Fall Semester Dates:

Sept 14, 28

Oct 12, 26

Nov 9

Dec 7, 21

Location: Zoom or In-Person



## **Question & Answer Time**

Please raise your hand or type in your question in the comment box.



# Post Survey

Please help us improve the effectiveness of this presentation.

