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
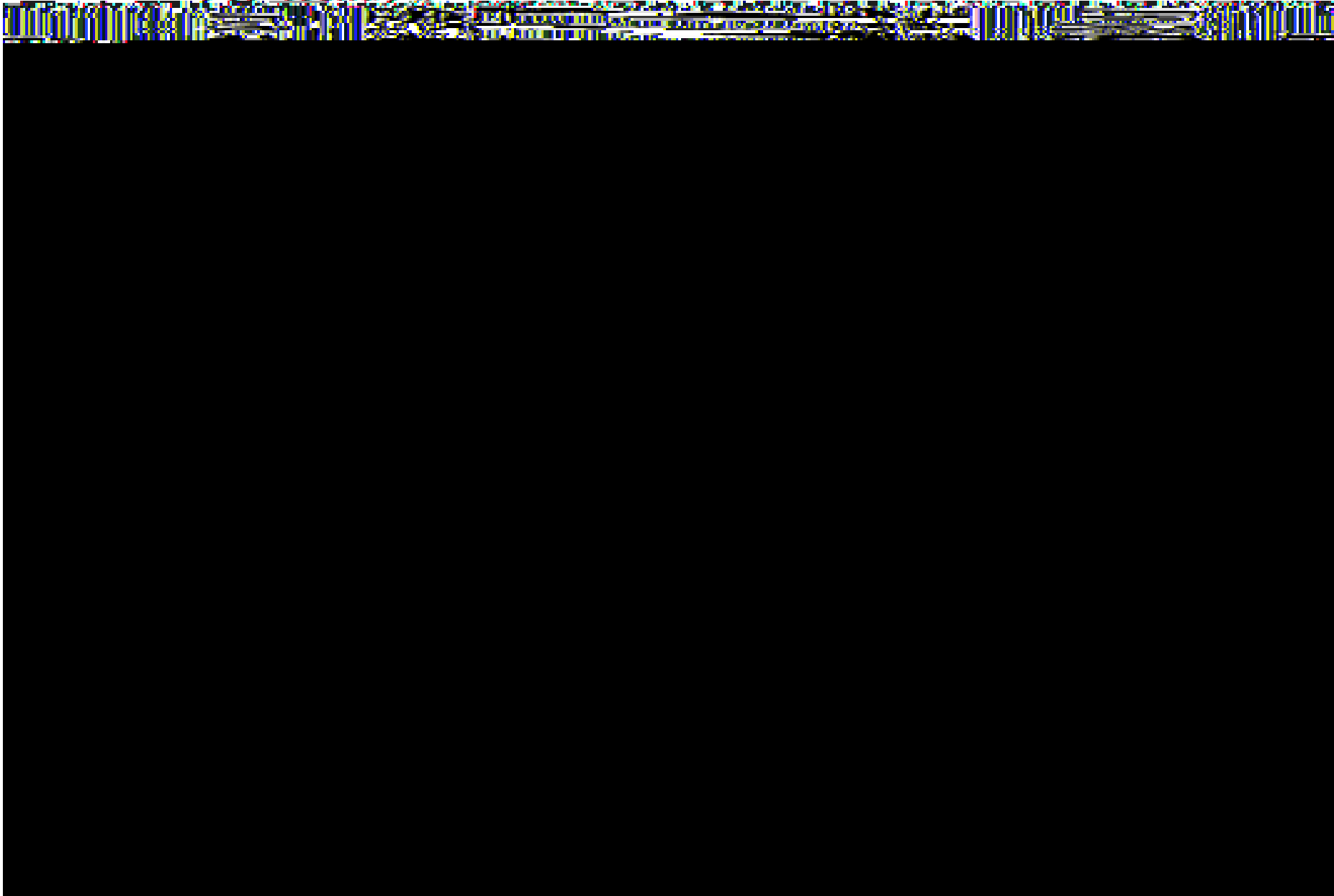
Bhavesh Patel, Buyer II
    Athletics Department
    The College of Science
    CSUBUY
    Misc. commodities

Agenda

Overview of Purchasing Process

Policies and Procedures Governing Procurement

Roles and Responsibilities of Procurement and the Campus Community

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

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

Delegation of Authority

Constitution

Legislature
Governor

Good or Services, $50,000   - $100,000
ITR $50,000- $500,000

Good or Services $100,000+
ITR $500,000+

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

What is a Requisition ?

Department Requisitions

User's guide "how to submit requisition in Peoplesoft"

Who can enter?

Include required documents

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.

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

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

ICT Review

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

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- 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:

_____

_____

Responsibilities

Procurement Department Responsibilities

RFQ/RFPSolicitation

Contract   dispute resolution

Develop, implement and maintain policies and procedures

Requesting Department Responsibilities

Engage Purchasing Early

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

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

Post Survey

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