Procurement of Goods and Services

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Contracts and Procurement

Sponsored by the Division of Administration & Finance
- Partners in Learning -
Who are we?

• We are the State of California acting in a higher education capacity
• We are a state agency and a public entity created by statute
• We are the Trustees
• We are California State University, Fullerton
Hierarchy of Governing Laws

- State Constitution
- California Regulations (CCR)
- BOT Resolutions
- Chancellor’s Executive Orders
- C.O. Policy Memoranda - SUAM
Authority to Contract

- Governed by statute
- Relationship between CSU and Contractors is created via written contract and governed by constitution, statute, and common law (decisions of state and federal courts)
- A public entity is not liable for a contract unless the entity is authorized by statute to incur the obligation
- Persons dealing with the public agency are presumed to know the law with respect to the requirements of competitive bidding and act at their peril
Delegation of Procurement Authority

- State of California
- Board of Trustees
- Chancellor
- Campus President
- Contracts and Procurement
Limited Delegation to Campus Users

- Pcard
- OfficeMax
- AP Check Request
Limited Delegation to Campus Users

- Blanket Orders
- Petty Cash
Contracts and Procurement

Oversee all aspects of the Procurement function

- Goods
- Services
- Contracts/Lease of Equipment
- Lease/License of real property
- Construction

** IT Goods and Services
Contracts and Procurement

Responsibilities

• Ensure compliance with State and CSU policies
• Develop fair, ethical and sound business practices
• Continued development and refinement of purchasing policies
• Facilitate fair and open competition for State dollars
• Apply competitive means to obtain ‘best value’
Volume Purchasing Programs

• CSU Master Enabling & Pricing Agreements
• State Master Pricing Agreements
• GSA & CMAS Pricing Agreements
• Cooperative & Consortium Purchasing Agreements
Prohibited Practices

- No employee shall place orders outside their limited delegation
- No employee may make or participate in decisions where there is a personal financial interest
- Commercial endorsements of products or services
- Misuse of the name “California State University”
- Restrictive specifications
- Splitting of orders to circumvent policy
- Advance Payments
Solicitation Methodologies

Goods
- Up to $50K – C&P determines
- $50K to $100K – Advertisement – Large Business
- $50K to $100K – No Advertisement – Certified Small Business (2 quotes)

- $100K and above – Advertisement - Formal Bid

Services
- Up to $50K – C&P determines
- $50K to $100K – No Advertisement – Certified Small Business (2 quotes)

- $50K and above – Advertisement - Formal Bid (if not SB)
Solicitation Methodologies

Information Technology (ITR)

- Up to $50K – C&P determines
- $50K to $500K – Informal
  * Goods – Advertisement - Over $100K
  * Services – Advertisement - Over $50K

- Over $500K – Advertisement – Formal Bid
Important Websites

- Contracts and Procurement: http://finance.fullerton.edu/procurement/
- Procurement Card: http://finance.fullerton.edu/Procurement/PCard/
- OfficeMax: http://finance.fullerton.edu/Procurement/OfficeMax/
- Accounts Payable: http://finance.fullerton.edu/Controller/AccountsPayable/
- Petty Cash: http://finance.fullerton.edu/Controller/AccountsPayable/GeneralInformation/PettyCash.aspx
Questions
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