



Information Technology Services (ITS)

IT Contracts Procurement Process Overview

August 2023



Procurement Process

- **P-Card**

- The P-Card single transaction **limits of \$1,500 and \$3,000** will be **increased to \$5,000** as of July 1, 2023
- The monthly purchase limit per card will also be automatically **increased to \$40,000 for locations with one credit card or to \$20,000 per card for locations with two credit cards**
- Professional Services transactions **no longer allowed**
- P-Card holder can purchase directly from approved vendors for goods and services

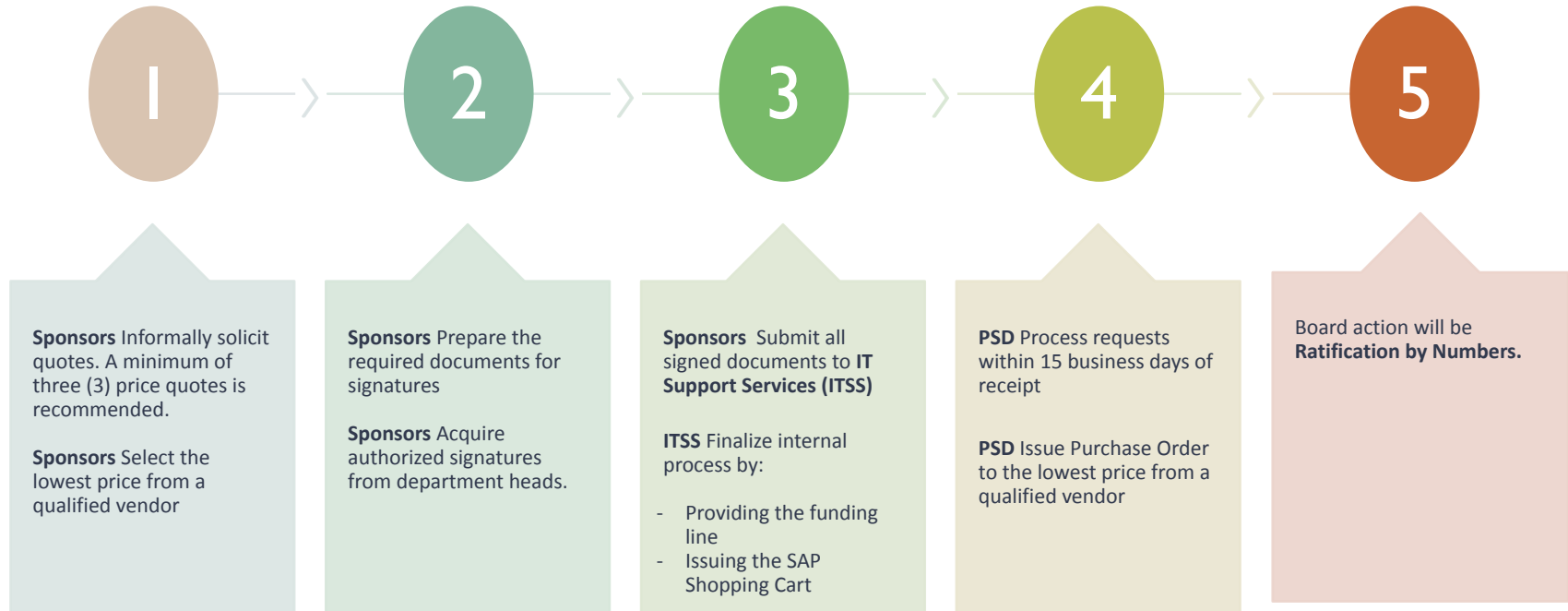
Procurement Process

Supplies, Equipment and General Services up to \$109,300

- No more auto-generated Purchase Orders **under \$25K**
- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - Vendor quote
 - Three (3) quotes is required
 - Processing time is “within 15 days”
 - Justification memo
- All documents will be uploaded in SAP and submitted to Procurement for review and PO processing

Procurement Process

Supplies, Equipment and General Services up to \$109,300



Procurement Process

Supplies, Equipment and General Services between \$109,300 & \$250,000

- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - **Signed Request for Procurement Action (RFPA)**
 - **Budgetary quote**
 - **Piggyback vendors can be proposed to expedite**
 - Processing time is **“60 to 80 days”**
 - **Transmittal Form**
 - **Specifications, Bidder Qualifications and Pricing sheets**
 - Justification memo
- All documents will be uploaded in SAP and submitted to Procurement. **A one-time Invitation for Bid (IFB) solicitation will be initiated unless piggyback vendor is approved.**

Procurement Process

Supplies, Equipment and General Services between \$109,300 & \$250,000



Sponsors Informally solicit quotes for budgetary purposes.

IT Contracts Suggest Piggyback vendors as an available option.

Sponsors Prepares the required documents for signatures

Sponsors Acquire authorized signatures from department heads.

IT Contracts will review and discuss Piggyback contract information with **Procurement (PSD)** for approval.

Or

A **one-time Invitation for Bid (IFB)** solicitation will be initiated.

PSD, Sponsors and IT Contracts Coordinate review, evaluate and finalize award recommendation during the one-time IFB process.

Entire one-time IFB process is estimated to be completed **within 60 - 80 business days of receipt**

Upon award, **ITSS** Finalize internal process by:

- Providing the funding line
- Issuing the SAP Shopping Cart

PSD Issue Purchase Order based on approved Piggyback vendor or based on one-time IFB results and award recommendations.

Board action will be **Ratification by Numbers.**

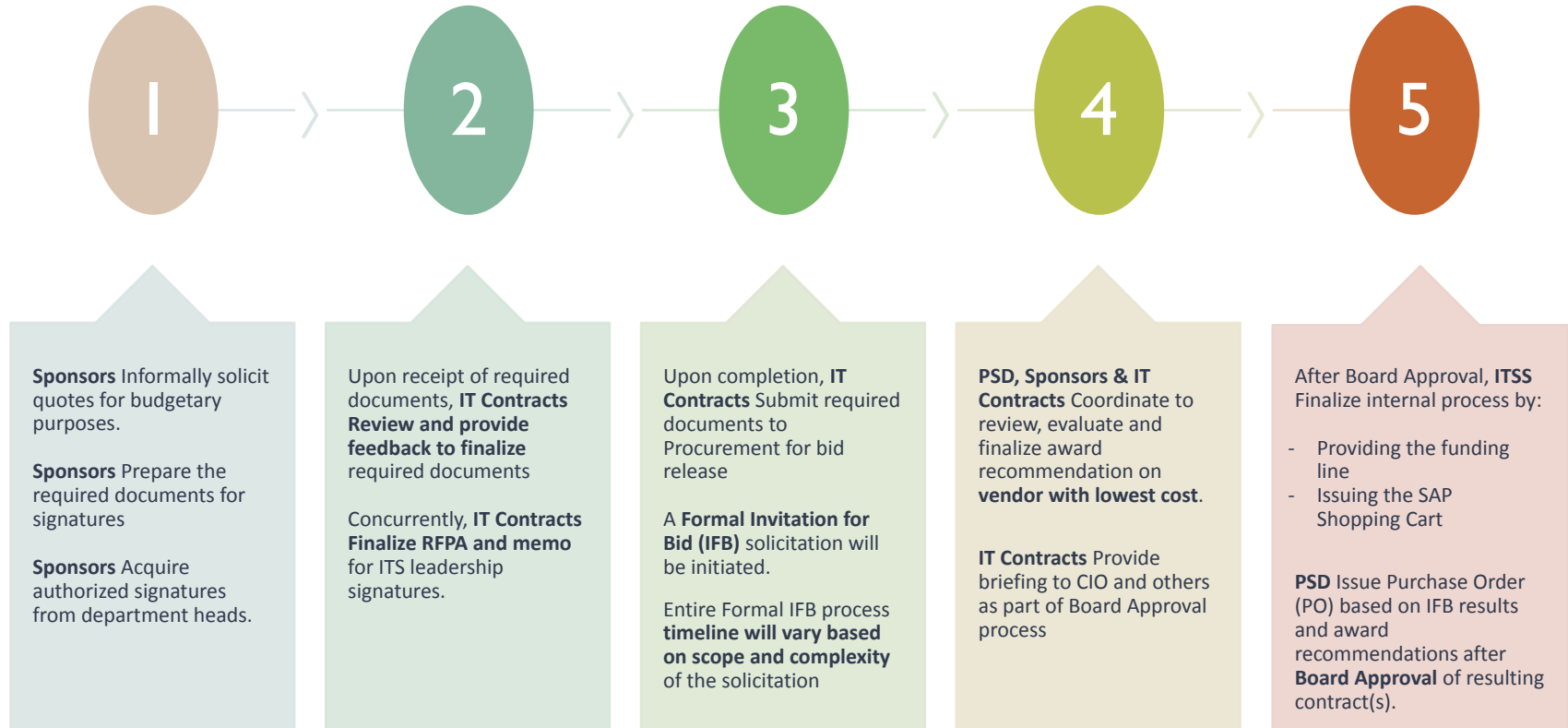
Procurement Process

Supplies, Equipment and General Services above \$250,000

- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - Signed Request for Procurement Action (RFPA)
 - **Budgetary estimate**
 - **A tailored acquisition will be developed**
 - Justification memo
 - Transmittal Form
 - Specifications, Bidder Qualifications and Pricing sheets
- All documents will be uploaded in SAP and submitted to Procurement. **An Invitation for Bid (IFB) solicitation will be initiated.**

Procurement Process

Supplies, Equipment and General Services above \$250,000



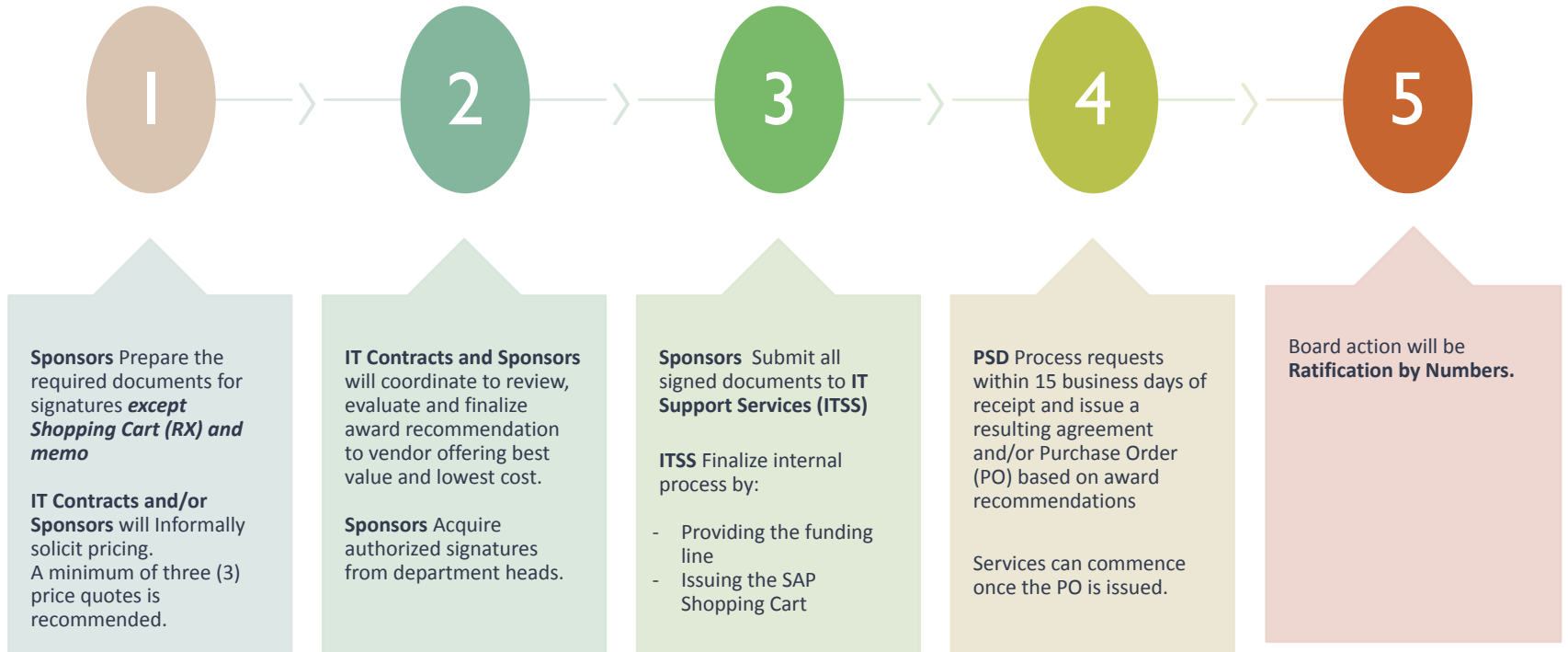
Procurement Process

Professional Services up to \$25,000

- No more auto-generated Purchase Orders **under \$25K**
- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - Vendor proposal (a minimum of three (3) required)
 - Justification memo
 - Minimum Qualifications, Evaluation Criteria, Submittal Requirements, Statement of Work and Pricing Requirements
- IT Contracts will work with Sponsors to solicit, evaluate, and make award recommendations
- All documents will be uploaded in SAP and submitted to Procurement for review and PO processing.
- Procurement's suggested processing time is "within 15 days"

Procurement Process

Professional Services up to \$25,000



Procurement Process

Professional Services between \$25,000 & \$250,000

- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - **Signed Request for Procurement Action (RFPA)**
 - **Budgetary estimate**
 - **A tailored acquisition will be developed**
 - Justification memo
 - **Transmittal Form**
 - Minimum Qualifications, Evaluation Criteria, Submittal Requirements, Statement of Work and Pricing Requirements
- All documents will be uploaded in SAP and submitted to Procurement.
- An Informal Request for Proposal (**IRFP**) **process will be initiated**

Procurement Process

Professional Services between \$25,000 & \$250,000



Sponsors Prepare the required documents and submit to IT Contracts for review

Upon receipt of required documents, **IT Contracts Review and provide feedback to finalize**

Concurrently, **IT Contracts Route Transmittal form, RFPA and memo** for management signatures.

IT Contracts Submit required signed documents to **Procurement (PSD)** to develop and complete solicitation packet

An **Informal Request for Procurement (IRFP)** solicitation will be initiated.

Entire IRFP process **timeline will vary based on scope and complexity** of the solicitation

PSD, Sponsors & IT Contracts Coordinate to review, evaluate and finalize award recommendation on vendor with best value and lowest cost.

PSD Fully execute agreement with selected vendor and notify Sponsors for services to commence.

PSD and IT Contracts Coordinate for **Board Ratification** process

ITSS Finalize internal process by:

- Providing the funding line
- Issuing the SAP Shopping Cart

IT Contracts and Sponsor Provide briefing to CIO and others as part of Board Ratification process

After Board Ratification, **IT Contracts and Sponsor** Monitor and manage contract activities i.e. renewals, extensions, amendments, etc.

Procurement Process

Professional Services over \$250,000

- Required documents to be submitted
 - Signed Shopping Cart (requisition form)
 - Signed Request for Procurement Action (RFPA)
 - Budgetary estimate
 - A tailored acquisition will be developed
 - Justification memo
 - Transmittal Form
 - Minimum Qualifications, Evaluation Criteria, Submittal Requirements, Statement of Work and Pricing Requirements
- All documents will be uploaded in SAP and submitted to Procurement.
- A formal Request for Proposal **(RFP) solicitation will be initiated**

Procurement Process

Professional Services over \$250,000



Sponsors Prepare the required documents and submit to IT Contracts for review

Upon receipt of required documents, **IT Contracts Review and provide feedback to finalize** documents

Concurrently, **IT Contracts Route Transmittal form, RFPA and memo** for management signatures.

IT Contracts Submit required signed documents to **Procurement (PSD)** to develop and complete solicitation packet

A **Formal Request for Procurement (RFP)** solicitation will be initiated.

Entire Formal RFP process **timeline will vary based on scope and complexity** of the solicitation

PSD, Sponsors & IT Contracts Coordinate to review, evaluate and finalize award recommendation on vendor with best value and lowest cost.

PSD and IT Contracts Coordinate activities for **Board Approval** process

IT Contracts and Sponsor Provide briefing to CIO and others as part of Board Approval process

Services to commence after Board Approval.

With Board approval, **PSD** Fully execute agreement with selected vendor and notify **Sponsors** for services to commence.

ITSS Finalize internal process by:

- Providing the funding line
- Issuing the SAP Shopping Cart

After Board Approval, **IT Contracts and Sponsors** Monitor and manage contract activities i.e. renewals, extensions, amendments, etc.



End of Presentation