

Cal State **Fullerton**

# Procurement Methods

**Presented by:** Alex Rosales



# CSU Purchasing Authority Overview

- **CSU Procurement Policy Overview:**
  - CSU is committed to fair, ethical, and professional business practices.
  - Policies ensure procurement is efficient, transparent, and delivers the best value for the University.
- **Delegation of Authority:**
  - **Board of Trustees:** Grants authority to the Chancellor under Education Codes and Public Contract Codes.
  - **Chancellor:** Delegates authority to campus presidents and administrative staff to manage purchasing, contracting, and related activities.
  - **Campus Presidents:** Delegates authority to Contracts & Procurement to ensure policies align with CSU's overall objectives.
- **Policy Intentions:**
  - Maximize flexibility for campuses while ensuring compliance with state law and CSU Trustees policy.
  - Promote sound business judgment and internal controls for procurement activities.

# Common Procurement Methods

- **Purchase Requisitions:** A formal internal request to procure goods or services, typically submitted by a department to the procurement office for approval and processing.
- **Competitive Bidding:** A formal process where suppliers submit sealed bids, and the contract is awarded based on predefined criteria such as price, quality, experience, and compliance with requirements to ensure the best overall value for the University.
- **Request for Quotations (RFQ):** A simplified method for obtaining price quotes from vendors for goods or services, typically used for mid-value purchases.
- **Request for Proposal (RFP):** A process for procuring complex services or products where proposals are evaluated based on multiple factors, including cost, quality, and approach.
- **Cooperative Purchasing:** A procurement method where multiple organizations pool their purchasing power to obtain better pricing and terms by leveraging existing contracts.

# Purchase Requisition Overview

- A purchasing requisition is a formal internal request to purchase goods or services, requiring approval before the purchase can be made.
- Detailed guidelines related to purchasing requisition are available on the CSUF IT website linked below.
- Trainings are available for:
  - Creating a Purchase Requisition, Requisition Checklist, Modifying a Requisition, Canceling a Requisition, and much more!



**Please scan QR code for these screensteps**

- If you have any questions or need assistance while entering your purchase requisition, please email us at [DL-C and P@fullerton.edu](mailto:DL-C and P@fullerton.edu), and we will be happy to help.

# Purchase Requisition Checklist

What should be included with the requisition (If Applicable)

- Vendor Add Request initiated through Smartsheet at the same time as submitting the requisition.
- Vendor quote that includes tax and shipping.
- Contractual documents that require review and signature.
- Independent Contractor Determination email
- Certificate of Insurance (C.O.I) – New Requirements as of 11/2024.
- Hospitality Form (formally known as D11)
- IT Purchasing Authorization (RITM) Approval
- CPFM Furniture ADA Approval
- Fleet Management Vehicle Purchase Justification
- Branding Approval from Strategic Communications
- Chemical Purchase Request Approval

\*Links available on slide 20

# CSU Bid Thresholds

Bid Threshold Table

| Type         | Less than \$49,999  | \$50,000-\$100,000                                      | \$100,001-\$500,000   | Greater than \$500,001  |
|--------------|---|---|---|---|
| Goods        | Competition not required but an informal solicitation is highly recommended | SB/DVBE Option<br>OR<br>Three (3) informal quotes (RFQ) | SB/DVBE Option (up to \$250K)<br>OR<br>Formal solicitation, advertised in CSUBuy (10 Business Days) (RFP) |   |
| Services     | Competition not required but an informal solicitation is highly recommended | SB/DVBE Option<br>OR<br>Three (3) informal quotes (RFQ) | SB/DVBE Option (up to \$250K)<br>OR<br>Formal solicitation, advertised in CSUBuy (10 Business Days) (RFP) |   |
| ITR Goods    | Competition not required but an informal solicitation is highly recommended | SB/DVBE Option<br>OR<br>Three (3) informal quotes (RFQ) | SB/DVBE Option (up to \$250K)<br>OR<br>Three (3) informal quotes (RFQ)                                    | Formal solicitation, advertised in CSUBuy (10 Business Days) (RFP)<br>*Feasibility Study may apply for ITR estimated at \$1M+ |
| ITR Services | Competition not required but an informal solicitation is highly recommended | SB/DVBE Option<br>OR<br>Three (3) informal quotes (RFQ) | SB/DVBE Option (up to \$250K)<br>OR<br>Three (3) informal quotes (RFQ)                                    | Formal solicitation, advertised in CSUBuy (10 Business Days) (RFP)<br>*Feasibility Study may apply for ITR estimated at \$1M+ |

# Request for Quotation (RFQ) Overview

A **Request for Quotation (RFQ)** is a procurement method used to obtain price quotes for goods or services, typically for mid-value purchases where requirements are clear. It ensures competitive pricing while maintaining efficiency.

- **Key Features of an RFQ:**

- Requires three (3) informal quotes unless a Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) option applies.
- Faster and less complex than a formal Request for Proposal (RFP).
- May be used for goods, services, IT-related goods, and IT services.

- **When to Use an RFQ:**

- When purchases are between \$50,000–\$100,000 (as per the table in the previous slide).
- When product/service specifications are well-defined.
- When a competitive, simplified, and expedited process is needed.
- When formal solicitation is not required, but cost comparison is necessary.

RFQs help promote competition, cost savings, and efficiency in public procurement while maintaining compliance with regulations.

# Request for Proposal (RFP) Overview

A **Request for Proposal (RFP)** is a formal solicitation used for complex procurements where factors beyond price, such as qualifications, experience, and methodology, are considered in vendor selection.

- **Key Features of an RFP:**

- Must be publicly advertised in Fi\$cal/Cal-e-Procure for at least 10 business days.
- Evaluated based on best value, not just the lowest price.
- Used for goods, services, IT-related goods, and IT services exceeding thresholds previously mentioned.
- Feasibility studies are required for IT-related procurements over \$1M.

- **When to Use an RFP:**

- Required for purchases over \$100,000 when a formal solicitation is needed (as per the table in the previous slide).
- When procurement requires detailed evaluation criteria.
- When solutions or approaches may vary among vendors.
- When technical expertise, experience, and methodology are key factors.

RFPs help ensure transparency, competitive selection, policy compliance and are the best value for public agencies in complex procurements.

# Cooperative & Master Enabling Agreements for CSU Procurement

The California State University (CSU) system utilizes **cooperative agreements** and **Master Enabling Agreements (MEAs)** to achieve better terms, pricing, and streamlined procurement. These agreements provide access to pre-negotiated contracts with vendors, ensuring competitive pricing, favorable terms, and reduced administrative effort for all types of purchases.

- **Key Procurement Vehicles:**

- **CSU Master Enabling Agreements (MEAs)** – Pre-negotiated contracts through the Chancellor's Office with vendors that simplify purchasing and ensure competitive pricing.
- **California Department of General Services (DGS) Contracts** – Statewide agreements offering pre-vetted suppliers and volume discounts.
- **Group Purchasing Organizations (GPOs)** – Contracts from cooperative purchasing groups like OMNIA Partners, TIPS, and Sourcewell, reducing processing time and administrative burden.
- **UC/CSU Agreements** – Inter-agency contracts between CSU and the University of California system to access shared pricing and services.
- **Educational Cooperatives** – Agreements through CSUBUY, E&I Cooperative Services, and other education-focused consortiums.

Using these agreements helps CSU institutions save time, reduce costs, and ensure compliance with procurement policies while meeting campus needs effectively.

# Evaluating & Selecting the Right Procurement Method

## Decision-Making Criteria:

When determining the most appropriate purchasing method, consider the following key factors:

- **Cost** – Aligns with budget constraints and ensures best value.
- **Time** – Accounts for urgency and procurement lead time.
- **Complexity** – Reflects the technical and contractual requirements.
- **Competition** – Determines market availability and vendor engagement.
- **Regulatory & CSU Compliance** – Ensures adherence to CSU policies, state laws, and procurement best practices.

## Selecting the Right Approach:

- For low-cost, straightforward needs → Purchase Requisition or RFQ (Between \$50,000& \$100,000)
- For complex or service-based procurements → RFP (Over \$100,000)
- For cost savings and efficiency → Cooperative Purchasing

# IT Purchasing Process

The electronic IT Purchase request form initiates and documents the review process of IT products/services to ensure our campus adheres to CSU policy. The form must be completed by the purchase requester, reviewed for compliance, and approved by an IT/ATI subject matter expert (SME) prior to proceeding with the purchase.

## The high-level steps involved in the process:

1. Request is submitted via Service Now.
2. Request is routed simultaneously to appropriate subject matter expert. Based on product/service, subject matter expert could include IT, ATI, ISO, PCI, and Contracts & Procurement.
3. Upon receipt and review of all required documentation, requests will be reviewed for compliance and assessed.
4. A response will be provided to the requestor.

**Note:** An IT Purchase Authorization is required for any purchase involving IT components, including hardware, software, AI tools, digital media subscriptions, cloud services, mobile apps, web-based platforms, or any service that processes, stores, or integrates data with campus systems.

# IT Purchasing Considerations

- If CSU Protected Data is being accessed by a Contractor, C&P will need to attach the Data Privacy and Security Rider to the contract
- If it is Software or a Web-Based platform being procured, then the Accessible Technology Initiative Policy applies. Therefore, you will need a VPAT from the Contractor for accessibility compliance review.
- VPAT is a supplier-generated statement that provides information on how a product or service conforms to the section 508 Accessibility Standards for Information Communication Technology (ICT)
- HECVAT is required when engaging vendors who handle sensitive or regulated university data, cloud services, or systems that integrate with campus infrastructure, particularly for security and privacy assessments.
- SOC 2 is required for vendors offering cloud services or software solutions that store or process sensitive data, providing third-party assurance of compliance with security, privacy, and data protection standards.
- EEAAP is required when IT determines that a VPAT is deficient or noncompliant with ADA regulation

These supporting documents or reports can either be provided in advance when submitting the IT Purchasing Process, or they will be requested by IT during their review.

Note: C&P cannot process an IT purchase request until the IT purchase request form (RITM) is completed

# CSU Insurance Requirements

CSU Risk Management Technical Letter RM 2012-01 requires all contractors, vendors, and suppliers providing services to the University to provide evidence of insurance with endorsements and insurer(s) rating by A.M. Best prior to commencement of any services.

- Evidence of Coverage Required:
  - **Commercial General Liability (GL)**
    - \$2,000,000/Occurrence
    - \$4,000,000/General Aggregate
    - \$1,000,000/Products-Completed Operations Aggregate
  - **Business Auto Liability (AL)**
    - \$1,000,000/Occurrence, combined single limit
  - **Workers Compensation (WC)**
    - As required under California State Law with Employers' Liability limits of not less than \$1,000,000
  - **Professional Liability (PL)**
    - \$5,000,000/Occurrence
    - \$5,000,000/General Aggregate

# Other Contracts & Agreements

Zero Dollar Contracts can be submitted via the Contract Request Application

- Clinical Internships: Teaching, Nursing, Social Work, etc.
- Memorandum of Understanding (MOU)
- Inter-agency & Intra-agency
- Revenue Generating Contracts
- Capital Equipment Leases
- Real Property Leases (Ground or Facility)
- Tax-Exempt Financing
- Emergency Agreements
- Auxiliary

# Contract Request Application Steps

Visit our website and go to our “Services, Forms, & Policies tab  
Then, go to “[Setup a Contract](#)”

## Services

### Set up a Contract

All contracts must meet the CSU’s requirements to ensure procurement and contracting activities are in compliance with applicable regulations. To begin the contract request process, follow these steps:

1. Gather all information (i.e. proposal, IT Authorization #) that will assist in the processing of the contract request.
2. Submit the contract request through the [Contract Request Application \(CRA\)](#) .

Once the request has been submitted in the CRA, a Buyer will be assigned and the requester will be cc'd on all correspondence with the vendor/contractor.

**Additional Information:** If you are new to the CRA process please complete the trainings below based on your role:

[Training for Requestors](#)

[Training for Approvers](#)

# New Request Form

Requestor Information

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|                   |   |              |           |
|-------------------|---|--------------|-----------|
| <b>Name</b>       | Kristiann Bonus   | <b>CWID</b>  | 847721669 |
| <b>Email</b>      | kbonus@fullerton.edu                                      | <b>Phone</b> | 8654      |
| <b>Department</b> | Contracts & Procurement (10064)                           |              |           |
| <b>College</b>    | AVP of Financial Services (AVP of Financial Services)     |              |           |
| <b>Division</b>   | VP Administration & Finance (VP Administration & Finance) |              |           |

Contractor / Service Provider or Site Information

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|  |                      |
|--|----------------------|
| <b>Contractor / Service Provider Name</b>    | <input type="text"/> |
| <b>Contractor / Service Provider Address</b> | <input type="text"/> |
| <b>Contact First Name</b>                    | <input type="text"/> |
| <b>Contact Last Name</b>                     | <input type="text"/> |
| <b>Contact Phone Number</b>                  | <input type="text"/> |
| <b>Contact Email Address</b>                 | <input type="text"/> |

# Contract Information

**Classification of  
Proposed Information**

(Please Select)



## Narrative Questions

**Describe the reason for requesting this contract and the anticipated benefit to the University.**

**Provide an overview of the proposed scope of this contract.**

**Describe any other significant factor(s) that will assist in the review and approval of this request.**

**Additional Details and Comments (Optional)**

## Amendment

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Is this request an amendment?

**Yes, this request is an amendment.**

## Attachments

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Adding Attachments: Attachments must be uploaded one at a time.

**Select File:**

No file chosen

File types accepted: .pdf, .doc, .docx, .xls, .xlsx, .jpg, .png

(Maximum file size is 8MB)

**Select Attachment Type:**

Request Attachment

## REQUEST ATTACHMENTS

There are no attachments submitted for this request.

## Approval Information

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**Approver:** Alex Rosales

# Consortium & MEA Links

CSU Marketplace

<https://solutions.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1744615954719>

Cal eProcure State Leveraged Procurement Agreements

<https://caleprocure.ca.gov/pages/LPASearch/lpa-search.aspx>

Omnia Partners

<https://www.omniapartners.com/>

Sourcewell

<https://www.sourcewell-mn.gov/contract-search>

E&I Cooperative Services

<https://www.eandi.org/contract-navigator>

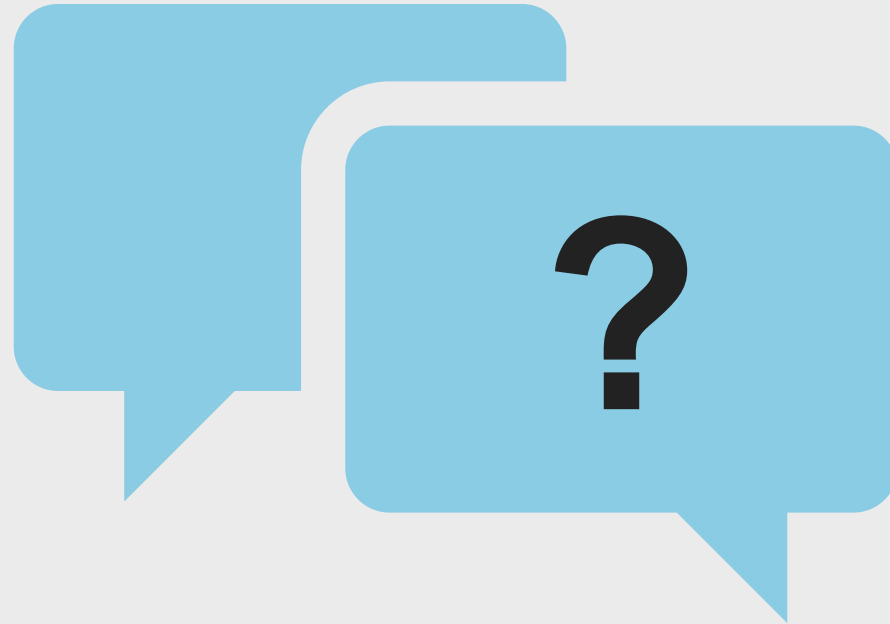
The Interlocal Purchasing System (TIPS)

<https://www.tips-usa.com/allvendors.cfm>

# Important Links

- Contracts and Procurement Website  
<https://financialservices.fullerton.edu/cp/>
- Contract Request Application  
<https://afapps.fullerton.edu/ContractRequest/Login.aspx?ReturnUrl=%2fContractRequest%2f>
- Vendor Add/Update Request (Managed by Accounts Payable)  
<https://app.smartsheet.com/b/form/277451bd666542aeb8e0d8b394114645>
- Submit CPFM ADA Furniture Layout Requests (Managed by CPFM)  
<https://app.smartsheet.com/b/form/035b17a7bea843baa6c9302d7385bfa3>
- IT Purchase Request  
[https://www.fullerton.edu/itpurchasing/it\\_purchasing\\_process/](https://www.fullerton.edu/itpurchasing/it_purchasing_process/)
- Chemical Purchase Request (Managed by EH&S)  
<https://csuf-afit.screenstepslive.com/m/111996/l/1446041-the-chemical-purchase-request-form>
- Independent Contractor Determination Request Form (Managed by HRIE)  
<https://app.smartsheet.com/b/form/081b63d32fdb43a797e53c29ac5f352c>
- Requisition Status Log  
<https://app.smartsheet.com/dynamicview/views/7f53b2d2-adc6-4979-b507-476b46b81588>
- Submit Fleet Management Vehicle Purchase Procedure (Managed by Michael Grace)  
<https://app.smartsheet.com/b/form/eecc60a3d5144b4caa3f8605f95ae04a>

# Questions?



# Training Survey

<https://app.smartsheet.com/b/form/e1ec853cfa914c2582610026b68b9fe9>

**Select Training: Purchasing Methods**

**Financial Services  
Spring 2025 Training Survey**



*Select the training you attended and complete survey questions.*

**Thank you from Financial Services!**