

Purchasing Department Director/Administrative Assistant Training

November 13, 2019

Presented by

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Purchasing Department

- Purchasing Department is located in the John Massey Center
- Purchasing Staff:
 - Craig Sisco, Director of Purchasing
 - Sheri Kingsbury, Senior Buyer
 - Rachel Potter, Buyer

The Role of Purchasing

- The Purchasing Department of Oklahoma City Community College carries out the dual responsibilities of providing a service to the college community and ensuring compliance with governing policies, regulations, and laws.
- Purchasing seeks to ensure the best value for the college through open, inclusive, and fair competition conducted under the highest ethical standards.

Policy and Laws

- OCCC Policy - No. 3004 – Purchasing - Currently going through a revision.
- Oklahoma Central Purchasing Act (74 O.S. § 85.3a) – Higher Education is exempt from this provision, however it is used as a guideline for our own policies and procedures, except as may be otherwise provided by law applicable to the Oklahoma State Regents for Higher Education (OSRHE).
- OMES (Office of Management & Enterprise Services) Statewide Accounting Guidelines
- State Laws

Purchasing Limits

- Less than \$5,000 – Small dollar purchases, no additional competition required.
- \$5,000 - \$15,000 – Requires the minimum of three (3) quotes, unless purchased from OCCC established contracts (Bid/RFP), state contracts, purchasing cooperative contracts, existing contracts established by a state college of university, or justified as a sole source.
- \$15,000 or greater – Requires formal competitive solicitation to be issued by the Purchasing department, unless purchased from OCCC established contracts (Bid/RFP), state contracts, purchasing cooperative contracts, existing contracts established by a state college of universities or justified as a sole source. If using E&G or Auxiliary funds, a completed and approved Budget Verification Form is required and submitted with all documentation to Purchasing once requisition is entered.
- Split purchasing for the purpose of evading the competitive bidding requirement is prohibited.

Exemption from Purchasing Limits

- State and Federal Contracts
- Purchasing Cooperatives
- Existing Contracts by a state colleges or universities
- Emergency Purchases
- Memberships and subscriptions
- Professional Services
- Sole source purchases
- Resale items in the Bookstore and Cafeteria
- Utilities

Sole Source

There are two types of sole source assertions.

- Supplier – One and only one supplier is capable of delivering the good or service needed, and that the supplier is exclusively qualified in the entire market to do so.
- Brand name – One and only one brand of good or service is capable of addressing the need, and that the brand is exclusively capable in the entire market to do so.

A sole source form is required and submitted with documentation to Purchasing once requisition is entered.

State Contracts

- Many contracts available.
- Solicitation has been issued and the process of award and contract execution is complete.

OMES (Office of Management & Enterprise Services)

<https://www.ok.gov/dcs/solicit/app/contractSearch.php>

Open Range – Established I.T./Technology state contracts

<https://www.ok.gov/openrange/About/index.html>

OneNet (Oklahoma State Regents for Higher Education) – I.T./Technology

<https://onenet.net/services/managed-contracts/>

Purchasing Cooperative Contracts

- Many contracts available specifically for educational institution use. (Higher Ed., K-12, Vocational)
- Solicitation issued and the process of award and contract execution is complete.

E&I Cooperative Services

<https://www.eandi.org/>

Sourcewell Cooperative Purchasing

<https://www.sourcewell-mn.gov/cooperative-purchasing>

Omnia Partners (formally National IPA)

<https://www.omniapartners.com/publicsector/national-ipa-an-omnia-partner>

Higher Education Institution Contracts

- University of Oklahoma Institutional Furniture Contract (#R-16000-16)
- Can utilize any college or university contract that is established.

Formal Solicitation (Bid/RFP)

- Formal solicitation is issued by Purchasing for purchases greater than \$15,000 and is not justified as a sole source or purchased from existing contracts.
- Invitation to Bid – Issued for specific product(s) and to obtain pricing from vendors.
- Request for Proposal – Issued for specialized products or services. Specific requirements known, but need vendor to propose the solution and cost.

Formal Solicitation (Bid/RFP)

Requirements to issue Bid/RFP:

- Written and detailed specifications, scope of work, requirements, list of items, etc.
- List of vendors you would like the Bid/RFP sent to.
- Estimated schedule (issue date, submission deadline)
- Pre-Bid Meeting (preferred date, meeting location, time)
- Start date, date the items are to be delivered.

Requisitions /Purchase Orders

- The requisition is the beginning of all institutional purchases for goods and services. The requisition is completed by the requestor and approved by the authorized person or persons for the specified budget.
- The approved requisition gives Purchasing the authority to move forward with processing the purchase order. Purchasing runs an approved requisition report each morning.
- Entry of a requisition and processing of a purchase order by Purchasing must be completed prior to any purchase commitment or executing a contract.

If new or refresher requisition training is required, please contact Purchasing to schedule one-on-one training.

PCard Purchases

- Used for small dollar purchases less than \$5,000. PCard purchases greater than PCard users single transaction limit will need to be processed by Purchasing. Split PCard transactions to avoid PCard user single transaction limit is prohibited.
- Entry of requisition and process purchase order required prior to any purchase commitment using the PCard.
- Change for Online Retail Purchases (Amazon, Staples, etc.) – No longer process purchase orders to utilize as a blanket purchase order. All online retail purchases will require entry of individual requisitions, per order, and itemized per item and quantity.
- Purchase orders for in-store purchases (Walmart, Crest, Lowes, etc.) will remain the same and processed as a blanket purchase order.

Obtaining a PCard

- Completion and approval of PCard Application.
- Required requisition training for new PCard users, if applicable.
- Required PCard training upon issuing of PCard.

Contracts

OCCC Contract for Services and Vendor Contracts

- Services that are provided on campus require a Contract for Services to be executed prior to commitment and services provided. Once contract is executed the purchase order will be processed and issued. Purchasing will also ensure the required insurance documentation from the vendor is on file.
- Vendor provided contracts must be reviewed by OCCC Legal Counsel before execution. Provide the contract to your President's Cabinet Member and they will forward to Legal Counsel for review.

Catering

- Must adhere to the same Purchasing policies and procedures regarding purchasing limits and competition requirements as any purchase for goods and services.
- Entry of requisition and process of a purchase order is required prior to commitment of the catering services.

Resources – Help is Available – Just Ask!

- Department or one-on-one Purchasing training or refresher
- Requisition training
- PCard training or refresher
- Vendor or order issues
- Any issues that you may have

- Purchasing website: www.occc.edu/purchasing

QUESTIONS?