



DOAS State Purchasing Toolbox

GA Fiscal Management Conference
September 23, 2013

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Training & Audit Director

Agenda



- **Importance of Procurements to Financials**
- **Purchasing Toolbox**
 - Law and/or Policy (Administrative Rules)
 - Delegated Purchasing Authority
 - Procurement Systems
 - Process for Making Purchases
 - Exempt Purchases
- **Navigating State Purchasing Web Site**
- **Available Resources**

Importance of Procurements to Financials



Statewide spend data is captured at the line level of purchase orders by either **NIGP Codes** or by **Purchase Type Codes**. Accurate statewide procurement spend is critical for state entities and the State Purchasing Division (SPD) for the following reasons:

- state entities to understand buying efficiencies and trends;
- state entities to detect the need for creating or renewing entity contracts;
- state entities and the State Purchasing Division (SPD) to verify compliance in procurement processes;
- SPD to create, dissolve, or renew statewide contracts; and
- SPD to respond to Executive and Legislative inquiries.

Importance of Procurements to Financials



Purchasing Toolbox



**Official Code of GA,
Annotated**

**GA Procurement
Manual**

**Delegated
Purchasing
Authority**

**Procurement
Systems**



Processes

**State Purchasing
Official Forms**

**Online Procurement
Tools**

**Training and
Certifications**

**Statewide Card
Programs**

**State Purchasing
Contacts**

State Purchasing Law



O.C.G.A. 50-5

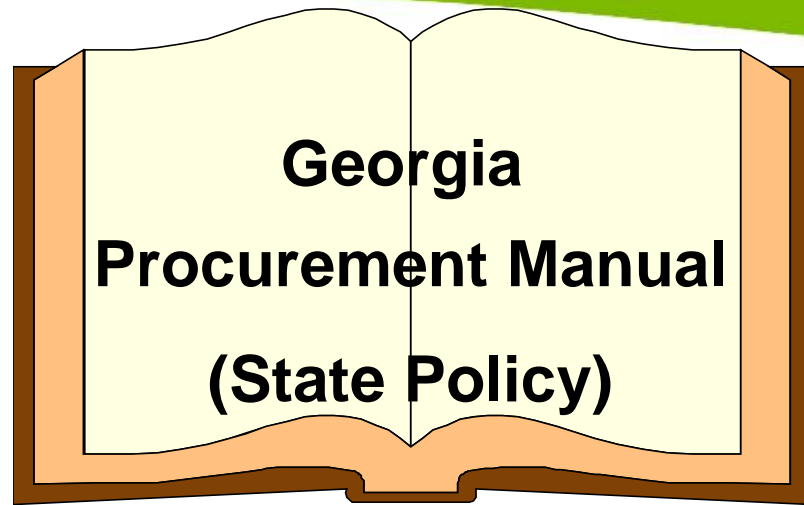
Establishes a centralized procurement operation for the state (State Purchasing Division of DOAS)

Authorizes the Commissioner of DOAS to make all state procurement rules and regulations (Georgia Procurement Manual)

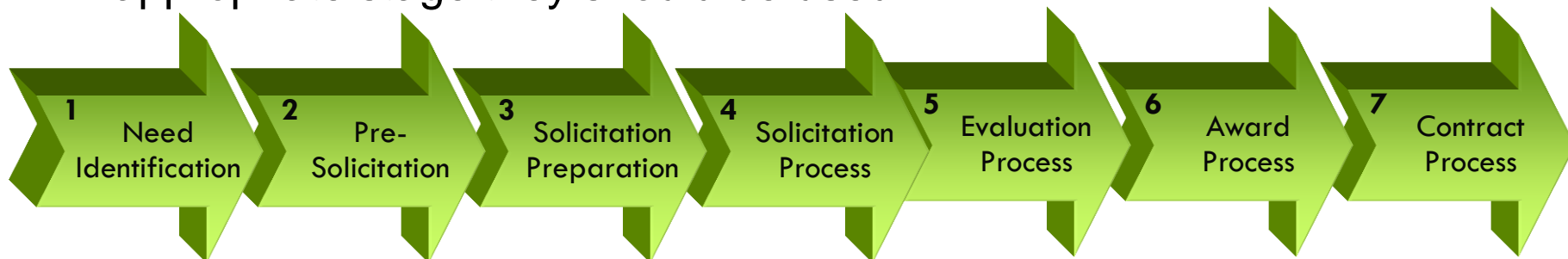
Authorizes centralized purchasing to control and reduce cost by contracting for sources of supplies, materials, services, and equipment (Statewide Contracts)

Ensures open and transparent competition for all qualified vendors in order to receive the lowest possible costs for commodities and services and **sets limits for competition** (Georgia Procurement Registry and Team GA Marketplace™)

Authorizes examination of books, records, and papers; report of purchases of any office, agency, department, board, bureau, commission, institution, or other entity of the state government relative to purchases (Procurement Audits)



- Administrative rules based on the Purchasing Law (O.C.G.A. 50-5) and best business practices
- Organized by the 7 Stages of Procurement
- A step-by-step depiction of the fundamental procurement process where the need for goods or services becomes an awarded contract (a PO can be a form of a contract)
- State Purchasing Official Forms - organized and numbered by the appropriate stage they should be used



GA Procurement Manual (GPM)



- No competition is required for purchases under \$25K
- Defines process for competitive bidding when purchase equals \$25K or more
 - Request for Quote (RFQ)

Type of solicitation where clear specifications are detailed so that a supplier can be identified who can provide the required specifications at the lowest possible cost.
 - Request for Proposal (RFP)

Type of solicitation that allows suppliers to propose their own comprehensive and innovative solution to the state's needs. The "best value" is determined by using a combination of technical and cost factors to evaluate suppliers' proposals.
 - Request for Qualified Contractor (RFQC) – a two step process
 1. Qualified suppliers are selected based on their ability to meet or exceed the identified qualification criteria – no award is made at this time.
 2. Qualified suppliers are eligible to submit a response to any future RFQ or RFP issued for the particular service, good, material or equipment for which the supplier has been prequalified to provide.

GA Procurement Manual (GPM)



■ Sole Sourcing Notice of Intent to Award:

This process requires research to confirm there is only one source of supply for the commodity or service.

Entity must provide public notice of the intended sole-source purchase or contract through a posting to the GPR. The purpose is to allow the free market to act as a check and balance on invalid sole sources by allowing suppliers to protest a sole source if:

- Suppliers believe and can document that they also meet the requirements of the sole source; or
- Suppliers believe the sole source requirements are unjustifiably restrictive.

The Sole Source Notice must meet the State Policy public notice posting guidelines (as required by the State Purchasing Law):

- For purchases less than \$250,000, the notice must be posted for 5 business days, or
- For purchases \$250,000 or greater, the notice must be posted for 15 business days .

Prior to designating a supplier by a **consortia** or **purchasing cooperative** as an authorized source of supply, the state entity must publicly post it's intent to purchase as a Sole Source Notice.

Delegated Purchasing Authority



State Purchasing	State Entities
<ul style="list-style-type: none">• Authority to issue delegations and transfers of procurement responsibilities for entities under DOAS purview.• Statewide delegations:<ul style="list-style-type: none">✓ Unlimited Delegation for RFQs✓ Delegation up to \$1MM for RFPs• DPAs are maintained in all procurement systems	<ul style="list-style-type: none">• Monitor purchasing activity to ensure expenditures do not exceed their DPA<ul style="list-style-type: none">• Per single purchase• Total purchase amount against contracts.• On a case-by-case basis, SPD may allow a state entity to exceed its existing DPA:<ul style="list-style-type: none">▪ request and receive written permission from SPD prior to exceeding its DPA.

State Procurement Systems



GA Procurement Registry (GPR)

Site for publicly posting notice of all state solicitations governed by the State Purchasing Law.

Three (3) ways to process solicitations on the GPR:

1) Posting directly to the GPR

Mandatory for posting Sole Source Notices

2) eSource: electronic sourcing tool through the GPR that is not tied to a procurement system such as PeopleSoft

Mandatory for posting RFQs, RFPs, and RFQCs by BOR or other entities not on Team Georgia Marketplace™

3) Team Georgia Marketplace™ (electronic bid posting in SAO PeopleSoft)

State Procurement Systems



Team Georgia Marketplace™

Provided by SPD and its partners and serves as an online tool to support various state purchasing functions:

- ✓ registration of suppliers
- ✓ advertisement of procurement solicitations and contract opportunities
- ✓ electronic bidding
- ✓ contracts management

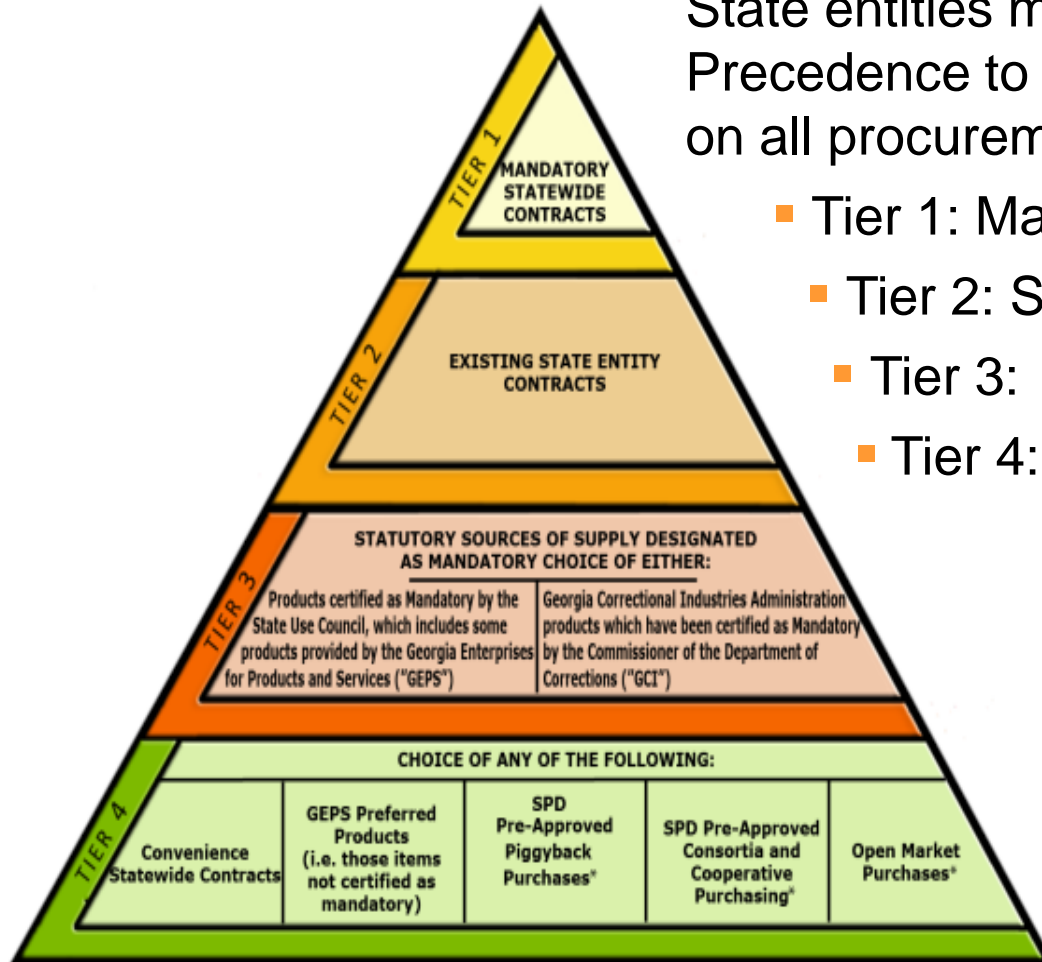
All solicitations posted to Team Georgia Marketplace™ are automatically publicly advertised on the GPR:

- ✓ *Mandatory* by entities that have implemented Team Georgia Marketplace™ for all RFQs, RFQCs, and RFPs unless SPD grants an exception.

Process for Making Purchases



State entities must follow the Order of Precedence to determine their source of supply on all procurements:



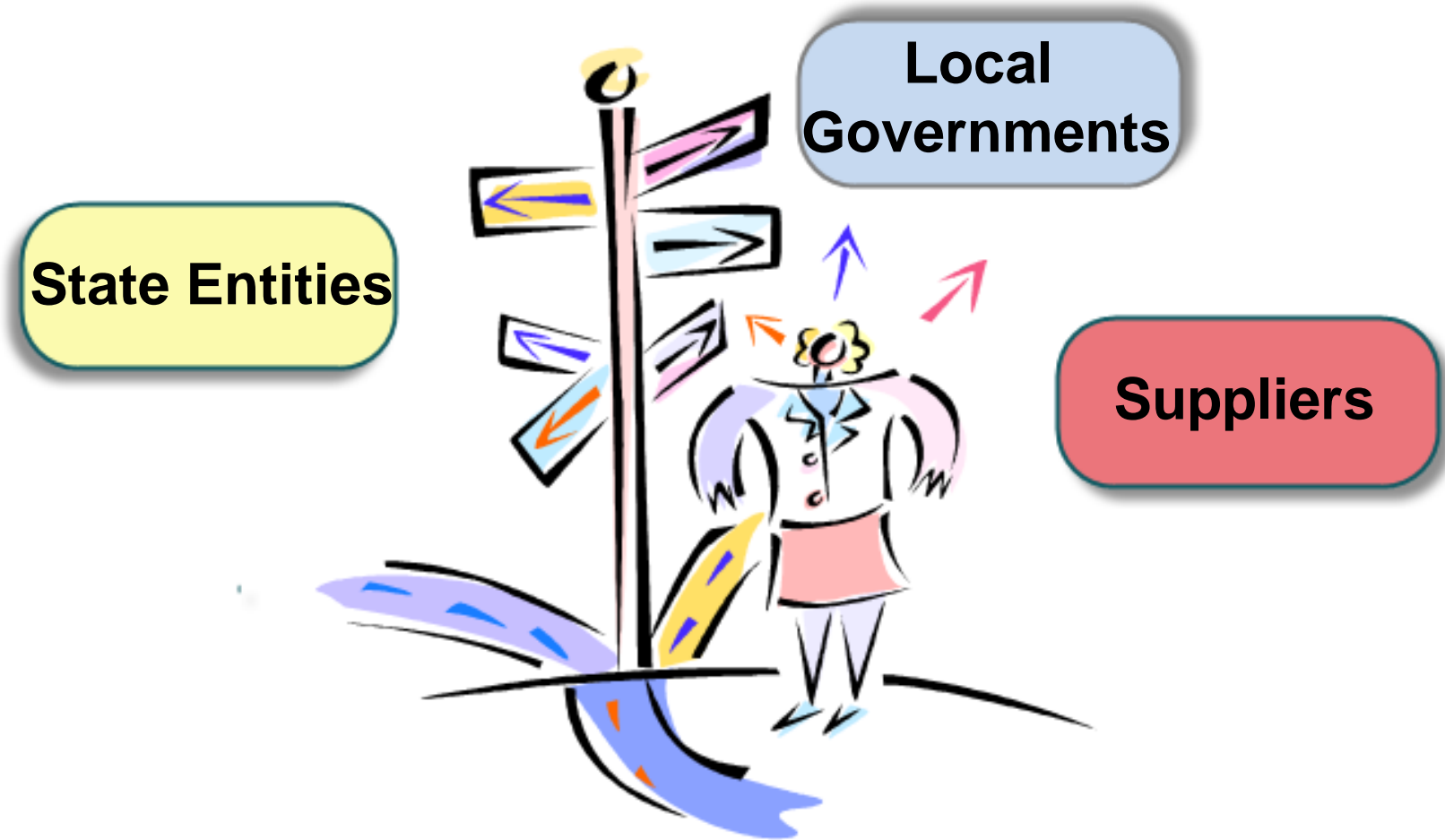
- Tier 1: Mandatory SWCs
- Tier 2: State Entity Contracts
- Tier 3: Statutory Sources of Supply
- Tier 4: One of the following:
 - Convenience SWCs
 - GEPS Preferred Products
 - Approved Piggyback Purchases
 - Approved Consortia or Cooperative Purchasing Agreement Purchases
 - Open Market Purchases

Order of Precedence

Exempt Purchases

<p>Identity of the Purchasing Entity</p>	<p>A state entity may have a full exemption based on their O.C.G.A.</p> <p>A state entity may have a partial exemption based on what is being procured that is exempted by O.C.G.A.</p>
<p>Identity of Provider/Supplier</p>	<p>Purchases from another governmental entity: Intergovernmental Agreements (Goods/Services)</p> <p>Purchases from a non-profit entity (must comply with O.C.G.A. 50-20-1)</p>
<p>Good/Service Procured</p>	<p>Certain Specified Goods/Services Examples: Professional Services and School Textbooks</p> <p>Competitive Bidding Requirements Waived by SPD detailed on the <i>NIGP Exempt List</i> (SPD web site)</p>
<p>Federal and/or Private Grant Funds</p>	<p>Any conflict between applicable federal law and the State Purchasing Act: contact SPD.</p> <p>Note: Federal and/or private grant funds are not exempt from the State Purchasing Act and the rules of competitive bidding still apply.</p>

Navigating State Purchasing Web Site



How to Get There

www.doas.georgia.gov



Georgia
Department of
Administrative Services

Mobile Sitemap Careers@DOAS Contact

Search GO Font Size: A⁺ A A⁻

Advanced Search

Department of Administrative Services
CUSTOMER FOCUSED, PERFORMANCE DRIVEN

DOAS Home About Us **State and Local** **Suppliers** Public and Non-Profit

STATE & LOCAL

State HRA Risk & Insurance

SUPPLIER SERVICES

Bids & Contracts Getting Started

PUBLIC & NON-PROFIT

Surplus Property Getting Started

Team Georgia Marketplace
Changing the way we do business!

Features

- Team Georgia Marketplace™
- Comprehensive Loss Control
- Statewide Card Programs
- Purchasing Training
- How do I...?
- How's my Service?

News

- Apr 17: Monday, April 22 is a State Holiday - State Offices Closed
- Apr 09: HR Statewide Assessment Kick-off
- Mar 15: Military Family Leave Update
- Mar 13: New Form I-9 Announcement

More News...

Direct Links

- State Agency Directory
- Team Georgia Marketplace Bidder & Supplier Portal
- Bid Notices - GA Procurement Registry
- Login to GPR for State & Local Entities
- eSource (formerly eQuote)
- GA Procurement Manual Online

Events

State Purchasing - Training

<http://doas.ga.gov/StateLocal/SPD/Pages/Home.aspx>




DOAS Home About Us State and Local Suppliers Public and Non-Profit

Home > State and Local > State Purchasing

EXPLORE STATE PURCHASING

- Contracts
 - » Knowledge Management
 - » Services & Contacts
 - » Process & Performance
 - » Policies & Procedures
 - » Procurement & Sourcing Tools
 - » 7 Stages of Procurement

Select your area of interest for more information...



[Agencies / University Suppliers Click Here](#)

STATE PURCHASING now on Facebook
Like us on Facebook
"Helping you Navigate State Procurement"

Features

- Team Georgia Marketplace™
- Official Forms & Documents
- Statewide Card Programs
- State of Georgia Fuel Price Index

Purchasing Training

Courses are offered on all phases of proposals, bidding, contract award, and certification.

[Learn more...](#)

- Agency Training
- Supplier Training
- Recorded Webinars

How do I... ?

News

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- ▶ **Apr 09:** HR Statewide Assessment Kick-off
- ▶ **Mar 15:** Military Family Leave Update

[More News...](#)

Direct Links

- ▶ Login to GPR for State and Local Entities
- ▶ Bid Notices - GA Procurement Registry
- ▶ Agency & University Procurement Officer List
- ▶ eSource (formerly eQuote)

State Purchasing – State Cards

<http://doas.ga.gov/StateLocal/SPD/Pages/Home.aspx>

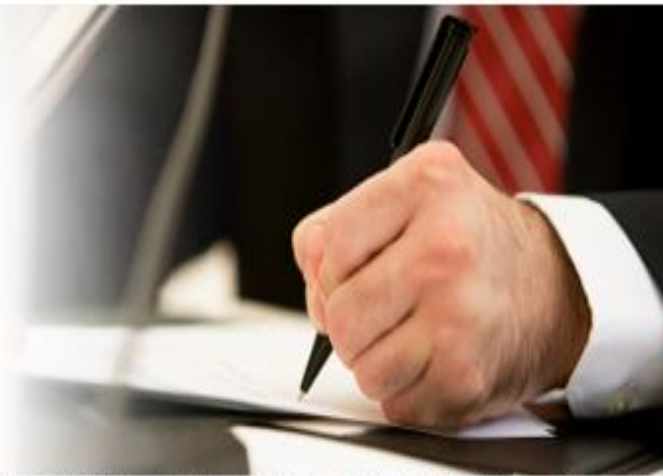


DOAS Home About Us State and Local Suppliers Public and Non-Profit

Home > State and Local > State Purchasing

EXPLORE STATE PURCHASING

- Contracts
- » Knowledge Management
- » Services & Contacts
- » Process & Performance
- » Policies & Procedures
- » Procurement & Sourcing Tools
- » 7 Stages of Procurement



Contracts at the statewide and agency level offer state and local governments a variety of products and services at competitive prices. Access to Team Georgia Market Place and contract indexes. [Learn More...](#)

Team Georgia Marketplace

Changing the way we do business

Features

- Team Georgia Marketplace™
- Official Forms & Documents
- Statewide Card Programs**
- State of Georgia Fuel Price Index
- Purchasing Training

Using statewide card programs to conduct business for the State of Georgia can simplify and help you manage your department's expenses. [Learn more...](#)

News

- » **Apr 17:** Monday, April 22 is a State Holiday - State Offices Closed

Direct Links

- » Login to GPR for State & Local Entities

Purchasing Resources



- **Explore State Purchasing Division Web Site**
 - Links to specific pages, i.e. Statewide Contracts
- **Resources**
 - State Purchasing Contacts
 - GA Procurement Manual (GPM)
 - Procurement Systems (GPR, Team Georgia Marketplace™)
 - State Purchasing Official Forms (7 Stages)
 - NIGP Exempt List
 - Debarred and Suspended Suppliers
 - And more...

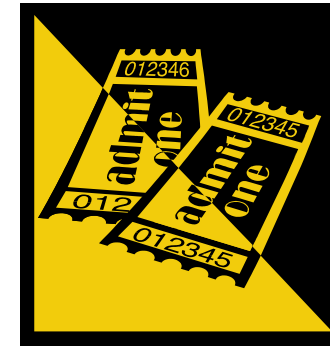


Other Resources

<http://doas.ga.gov/StateLocal/SPD/Pages/Home.aspx>



News



Events



Features



Direct Links

What's in Your Purchasing Toolbox?



DOAS State Purchasing Division (SPD) Web Site



<http://doas.ga.gov/StateLocal/SPD/Pages/Home.aspx>

Questions...

