

**Department of General Services,  
Procurement Division (DGS)  
and**

**The Department of Technology, Statewide Technology  
Procurement Division (STPD)**

**Changes that effect the  
Purchasing Authority  
of  
Information Technology Goods  
and Services Acquisitions**

## Department Presenters

- Marnell Voss, Deputy Director, CalTech's Statewide Technology Procurement Division
- Eric Mandell, Chief of Acquisitions, DGS' Procurement Division

## **Presentation Objective: What has Changed?**

Acquisitions that are part of a Reportable IT Project and exceeds a State Agency's purchasing authority are now under the Department of Technology's Statewide Technology Procurement Division oversight effective July 1, 2013.

- This change is made pursuant to SB 71, Section 51
- Public Contract Code (PCC) Section 12100 amended.

## What is a Reportable IT Project?

State Administrative Manual (SAM) provides the definition

### Section 4819.37

INFORMATION TECHNOLOGY  
(California Department of Technology)  
PROJECT REPORTING CRITERIA

## It All Starts Here.....

### Laws:

- SB 71
- Public Contract Code Section 12100
- Government Code 14600 (DGS)
- Government Code 11545 (CalTech)

### Policy:

- State Contracting Manual, Volume 3
- State Administrative Manual, Sections 4800 and 5200

This list is not intended to be all inclusive

## Who does What ? Simply Stated...

### CalTech STPD:

- Conducts Reportable IT Acquisitions
- IT Reportable Project Oversight

### DGS:

- Conducts Non Reportable IT Acquisitions
- Delegates Purchasing Authority

### CalTech and DGS:

- Collaborate on IT Procurement Policy and Procedures

### State Agency:

- Can conduct both Non Reportable and Reportable IT Acquisitions if within the agency's purchasing authority
- IT Project oversight within delegation

## Conducting IT Acquisitions CalTech

CalTech STPD conducts when:

Acquisitions are part of an IT Reportable Project and exceeds the State Agency's purchasing authority.

## Conducting IT Acquisitions DGS

DGS conducts when:

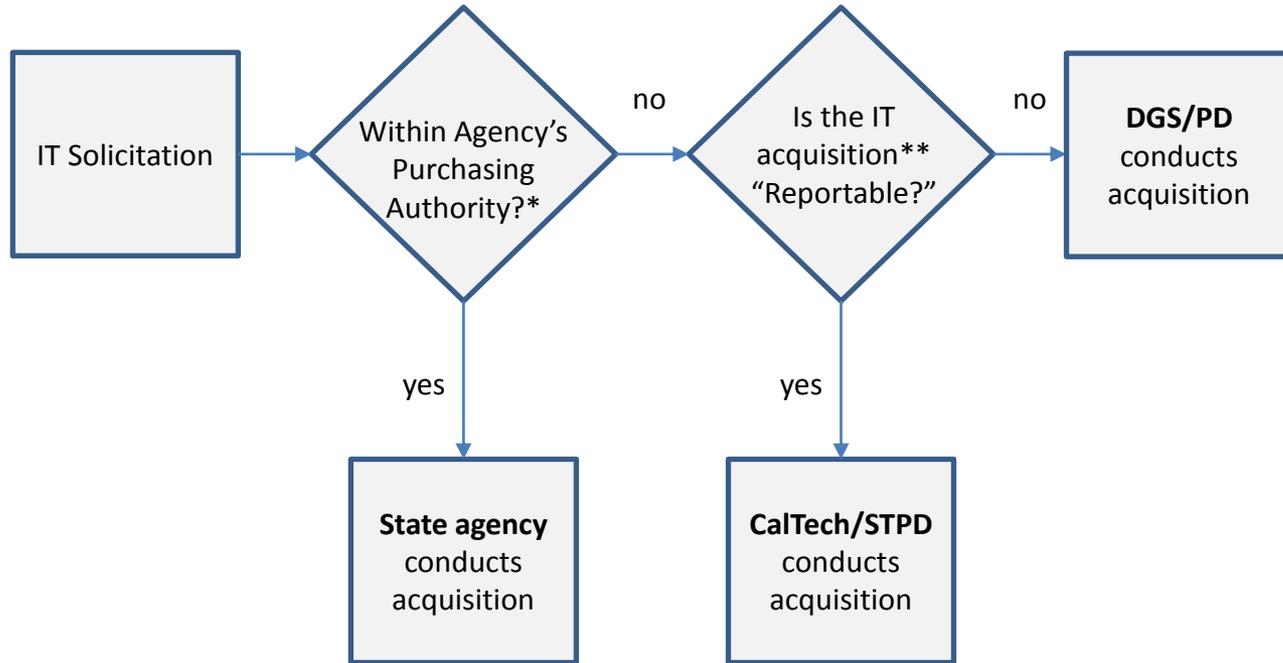
Acquisitions are NOT part of an IT Reportable Project and exceed the State Agency's purchasing authority.

## Conducting IT Acquisitions State Agencies

State Agency conducts when:

- Acquisitions are part of an IT Reportable Project AND within their purchasing authority.
- Acquisitions are NOT part of an IT Reportable Project AND within their purchasing authority.

## Authority to Conduct IT Acquisitions



\*Procurement method is relevant to the decision process because DGS Purchasing Authority dollar thresholds differ.

\*\*See State Administrative Manual (SAM) 4819.37 "Project Reporting Criteria" - the Feasibility Study Report (FSR) must be approved in accordance with this section.

## Summary

DGS/PD and CalTech/STPD have formed a partnership to better serve our customers.

We are working jointly on the following:

- A Communication Plan
- Conducting Customer Forums Together
- Collaborating on New and/or Existing Procurement Policy and Procedure Efforts

## Questions & Contact Information

CalTech's STPD:

[ciotechnologyprocurements@state.ca.gov](mailto:ciotechnologyprocurements@state.ca.gov)

DGS' PD:

[pams@dgs.ca.gov](mailto:pams@dgs.ca.gov)

DGS-PD – IT Vendor Forum

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Acquisitions Branch  
Department of General Services  
State of California

## Overview

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### Procurement Division

The State of CA awards over 10 billion dollars in contracts for goods, services and construction each year. DGS, through its Procurement Division (PD), is California's purchasing agent.

## Overview

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### State Acquisitions

- Leveraged Procurement Agreements
- State Financial Marketplace
- One-Time Acquisitions
- Small Business and DVBE

## Overview

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### Leveraged Procurement Agreements (LPAs)

- California Multiple Award Schedules
- Statewide Commodity Contracts
- Cooperative Agreements (WSCA-NASPO)
- Food Acquisitions\*
- Master Agreements
- Pharmaceutical Acquisitions\*
- Software Licensing Program
- State Price Schedules\*

\* (Will not be covered today)

## California Multiple Award Schedules (CMAS)

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- 1,500+ CMAS contracts
- Application process
- \$500,000 per order limit
- <http://www.dgs.ca.gov/pd/Programs/Leveraged/CMAS.aspx>

## Statewide Commodity Contracts

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- DGS-PD competes and administers statewide commodity contracts for use by State departments and California local governments
- Used as one of the State's main procurement vehicles for leveraging its buying power
- Website:  
<http://www.dgs.ca.gov/pd/Programs/Leveraged/contracts.aspx>
- Storage/Servers/Desktops/Laptops/Printers
  - Common Configuration vs Scenario
  - Publically available index
  - Core vs Off-Spec

## Cooperative Agreements (WSCA-NASPO)

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- Multi-state cooperative agreements
- Participating Addendum
- Contract Purchase Limits
- Exclusions: mandatory statewide contacts
- <http://www.dgs.ca.gov/pd/Programs/Leveraged/wsc.aspx>

## Master Agreements

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- Goods and Services
- \$1,500,000 per order limit
- IT Consulting Services MSA Application
- RFP 5147001 IT Negotiations Consulting Services
- <http://www.dgs.ca.gov/pd/Programs/Leveraged/masteragreements.aspx>

## Software Licensing Program

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- Software publishers
- Authorized resellers
- \$2,000,000 per order limit
- <http://www.dgs.ca.gov/pd/Programs/Leveraged/SLP.aspx>

## State Financial Marketplace

Nationally recognized, award-winning financing and acquisitions payment programs that serve all California governmental entities

- **GS \$Mart:** Facilitates State of California local government installment or lease purchases. Meets all requirements of a competitively bid process
- **Lease \$Mart:** A leasing marketplace offering a viable framework for state and local government agencies to quickly access the services of leasing companies
- **Energy \$Mart:** Facilitates State of California and local government financing of energy and energy management transactions. Meets all requirements of a competitively bid process
- <http://www.dgs.ca.gov/pd/Programs/StateFinancialMarketplace/GSMart.aspx>

## One-Time Acquisitions

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- The Procurement Division's One-Time Acquisitions (OTA) Unit conducts procurements on behalf of state departments for purchases that exceed a department's delegated purchasing authority.
- OTA conducts both Information Technology (IT) goods and services and non-information technology (non-IT) goods procurements
- <http://www.dgs.ca.gov/pd/Programs/onetime.aspx>

## Small Business and DVBE

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### Certification and Outreach

- Oversees and administers statewide SB and DVBE certification programs, providing general advice and/or referral for:
  - Outreach, advocacy, dispute resolution, contracting opportunities, program abuse, and economic and business resources
- Prompt Payment /Advocacy
- Reciprocity- Many local governments use DGS' certification as their own
- <http://www.dgs.ca.gov/pd/Home.aspx>

## Small Business and DVBE

### Certification and Outreach (cont.)

- Provides clear, consistent and accurate information about PD programs, initiatives, outreach and accomplishments related to “How To Do Business With The State”
- Internal/ External Communication Source keeping customers updated on policy and procedural changes using the most timely and cost-effective methods possible
- Conference Coordinating: Customer Forums, Customer Focus Groups meetings, SB and DVBE Council meetings, Bidder Conference, etc. Joint events with local government in your communities
- Customer & Supplier Advocate: Resource to state agencies, departments, and suppliers seeking information regarding state bidding processes, procedures, and regulations and to bidders seeking to file bid protests

## Trends

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- Environmentally Preferable Purchasing (EPP)
- (Need some info here on how EPP effects Tech Buys)
- Cloud
- Upcoming Contracts
  - PC Servers – 11/14/14

**Thank you**