Procurement Service Center
Purchasing Process

Procurement Manager, Crystal DiCino
**PURCHASING BIDDING THRESHOLDS AND BID TYPES**

Goods and Services (non federally/Federally funded)
- $150,001 through $500,000 = Competition via Documented Quote

Goods or Services
- Greater than $500,000 = Competition Request for Proposal or Invitation for Bid
$10,000 AND UNDER

- PO auto generated after financial approval
- When to Involve Purchasing
  - [https://www.cu.edu/psc/commodity-listing](https://www.cu.edu/psc/commodity-listing)
    - When terms and conditions apply
      - Clickthrough’s included
      - $0/trials included
    - When Compliance Language is required
      - Sensitive Data is being exchanged
        - HIPAA/PHI
        - FERPA
        - PCI

- Potential Issues
  - PO gets issued before contract signed or before compliance language inserted into document.
**SOLE SOURCE**

**What is a Sole Source and when can it be used?**

When there is only one Good or Service that can reasonably meet the need and there is only one supplier who can provide the Good or Service.

**NOT a Sole Source**

- Brand Name
- Price
- History
- Preference

**May Be a Sole Source:**

- Continuity
- Matches Existing Equipment

**State your case Sole Source Justification:**

1. Needs Statement
2. Features Requirements
3. Competing Brands
COMPLIANCE REVIEW – CONTRACT

Current Process

- Purchasing Agent and/or Department reaches out to its Campus Security, Accessibility and Compliance Teams.
- Security, Accessibility and Compliance Team provides Compliance Results Department
- Supplier Document(s) and Compliance Results entered into PSC Contract system (TCM) and assigned to Contracts Team or Negotiated by Purchasing Agent.
WHAT IS REVIEWED?

Major Legal issues
  Indemnification
  Choice of law
  Attorneys’ fees
  Insurance
  Limitations of Liability

University Provisions added

NOTE: Please plan ahead, Compliance review can take 2-8 weeks and contracting post compliance can take the same (average) or longer depending on how complex and supplier responsiveness.
ADDITIONAL APPROVALS

- $150k and Greater
  - May require Controller approval
  - Director of Procurement & Contract Services approval

- $1M and Greater
  - Associate Vice President and Chief Procurement Officer approval

- $5M and Greater
  - President Approval

- $10M and Greater
  - Regents awareness
START

$10k and Greater

Purchasing Agent Signs and PO Issued

Supplier signs

Sent to Supplier for signature

Contract entered in Contract System

Reviewed by Contract Team

Final approval (Controller over $150k) and Compliance Approval

Negotiate legal terms

Compliance review and assessment

Compliance Language added

HIPAA

FERPA

END
Questions?