TODAY'S TRAINING ROADMAP

What is Procurement?

What is competitive procurement?

Who oversees procurement in the State of CT?

How do I procure goods and contractual services?

How do I procure professional and human services?

How can I tell what kind of procurement I need to do?

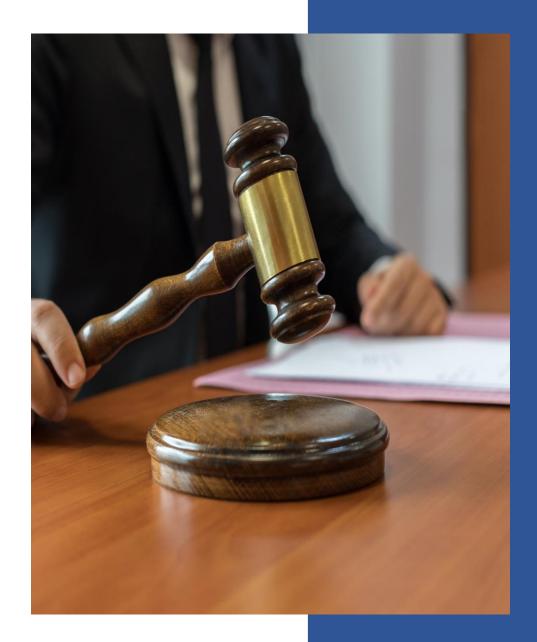What do I do if I need help with procurement in the future?

WHAT IS PROCUREMENT?

SOURCING AND ACQUIRING THE GOODS AND SERVICES THE STATE NEEDS TO DO BUSINESS

- Entire process from identifying a need to disposing of old items
- Get the best quality goods and services at the best prices
- Address socio-economic issues and challenges in the state

WHY ARE THERE SO MANY RULES FOR PROCUREMENT?

- Competitive process required

- Uses *public* funds, so we have to spend carefully

- Avoid conflict of interest and unethical conduct

- Leverage purchasing power to negotiate best prices

- Hold vendors accountable for desired outcomes

WHAT IS *COMPETITIVE* PROCUREMENT?

PROCESS BY WHICH THE STATE LOOKS FOR THE BEST COST OR BEST VALUE OPTION TO OBTAIN GOODS AND SERVICES NEEDED

- Solicitation must be public, open, and fair

- Anyone can see and respond to it

- Transparent Process

APPROVAL MUST BE GRANTED TO WAIVE THE COMPETITION PROCESS, RESULTING IN A SOLE-SOURCE PROCUREMENT.

TYPES OF COMPETITIVE PROCUREMENT

QUOTATIONS

BIDS

PROPOSALS

NEGOTIATED AGREEMENTS

HOW DO I INITIATE A PROCUREMENT IN CONNECTICUT?

IT DEPENDS ON WHAT TYPE OF GOOD OR SERVICE YOU ARE PROCURING.

CONNECTICUT PROCUREMENT AUTHORITIES

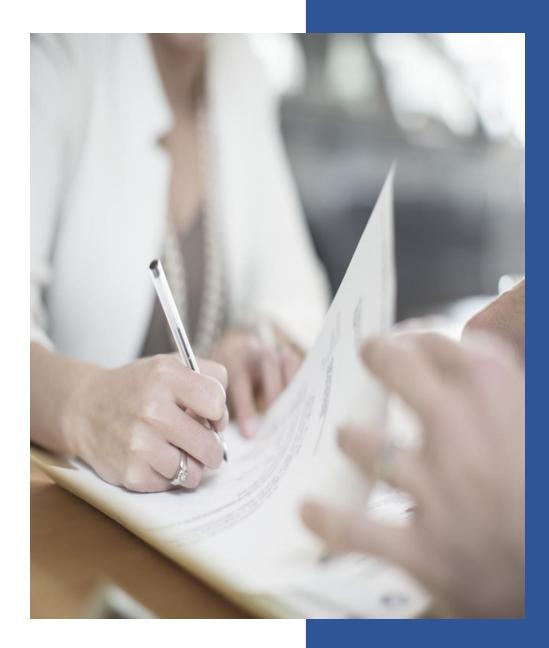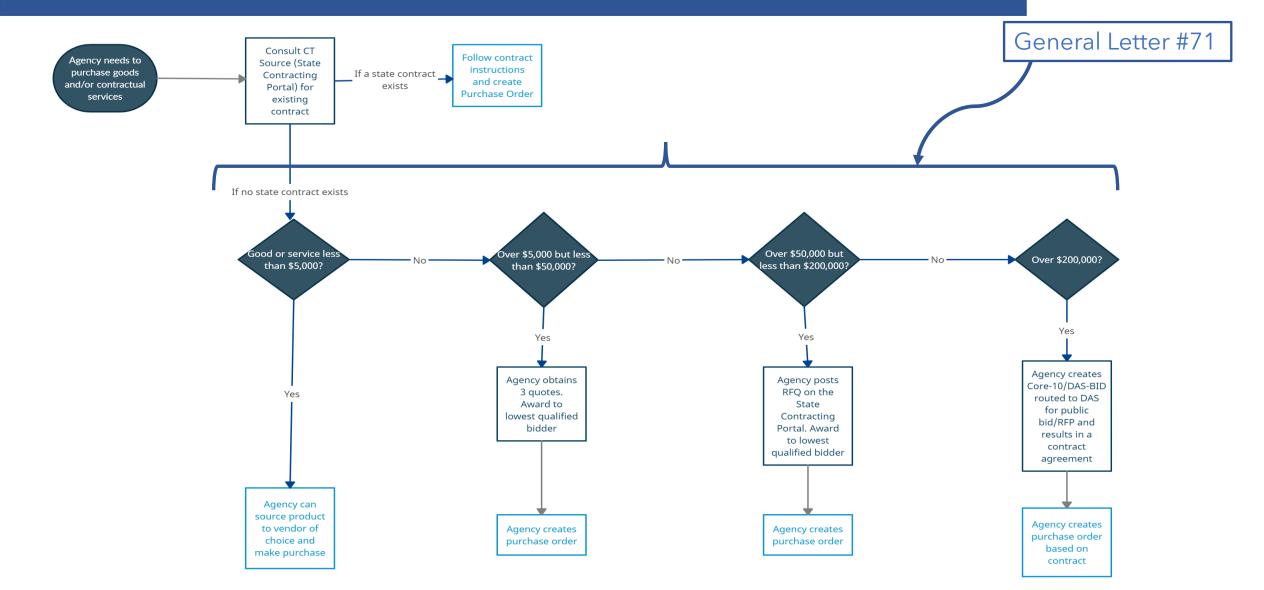| WHAT IS BEING PROCURED?	WHICH AGENCY IS RESPONSIBLE?
Products/Goods Contractual Services (Including IT and Telecomm)	DAS Procurement Services
Professional Services Health and Human Services	Individual agency with OPM/Finance Oversight
Roadway Construction	DOT
Building Construction	DAS Construction Services
Real Property	DAS Property Leasing and Transfer

DAS PROCUREMENT

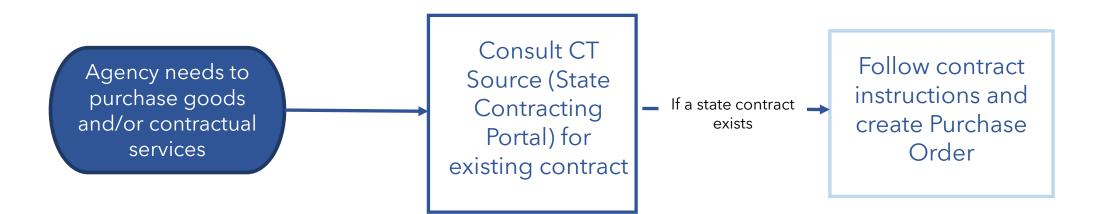## ROLES AND PROCESSES

WHAT IS THE ROLE OF DAS IN PROCUREMENT?

- Sets procurement policy and procedures

- Administers contracts for all products and contractual services over $200,000

- Delegates procurement authority to agencies for purchases less than $200,000 via General Letter 71 (GL-71)

PROCURING A GOOD OR CONTRACTUAL SERVICE

General Letter #71

Agency needs to purchase goods and/or contractual services

Consult CT Source (State Contracting Portal) for existing contract

If a state contract exists → Follow contract instructions and create Purchase Order

If no state contract exists

Good or service less than $5,000?

No → **Over $5,000 but less than $50,000?**

No → **Over $50,000 but less than $200,000?**

No → **Over $200,000?**

Yes ↓ (Good or service less than $5,000?)
Agency can source product to vendor of choice and make purchase

Yes ↓ (Over $5,000 but less than $50,000?)
Agency obtains 3 quotes. Award to lowest qualified bidder
→ Agency creates purchase order

Yes ↓ (Over $50,000 but less than $200,000?)
Agency posts RFQ on the State Contracting Portal. Award to lowest qualified bidder
→ Agency creates purchase order

Yes ↓ (Over $200,000?)
Agency creates Core-10/DAS-BID routed to DAS for public bid/RFP and results in a contract agreement
→ Agency creates purchase order based on contract

USING A STATE CONTRACT

Agency needs to purchase goods and/or contractual services → Consult CT Source (State Contracting Portal) for existing contract — If a state contract exists → Follow contract instructions and create Purchase Order

USING CT-SOURCE

WHAT CONTRACTS ARE OUT THERE?

OFFICE SUPPLIES
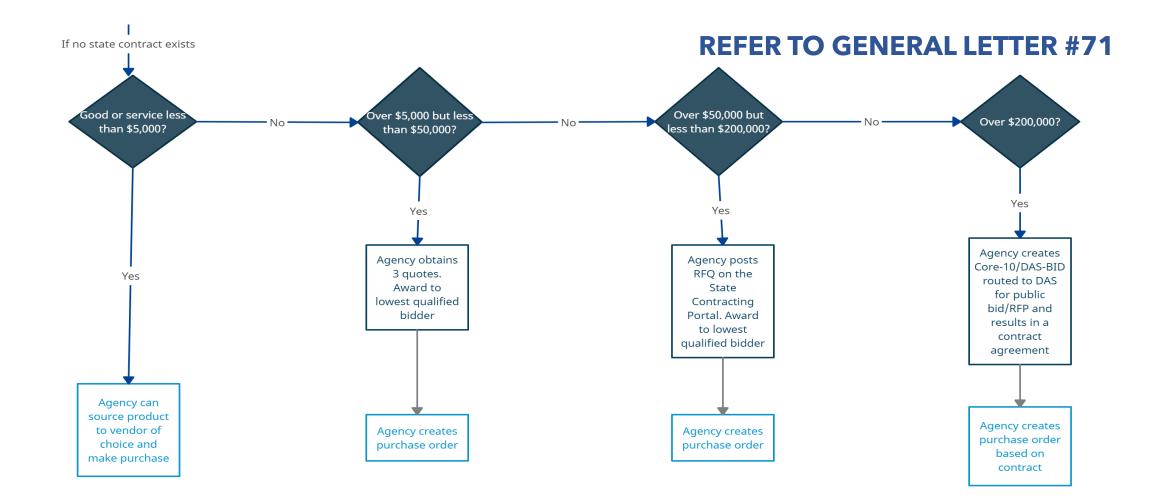
VEHICLES

IT EQUIPMENT

JANITORIAL SERVICES

…AND THOUSANDS MORE
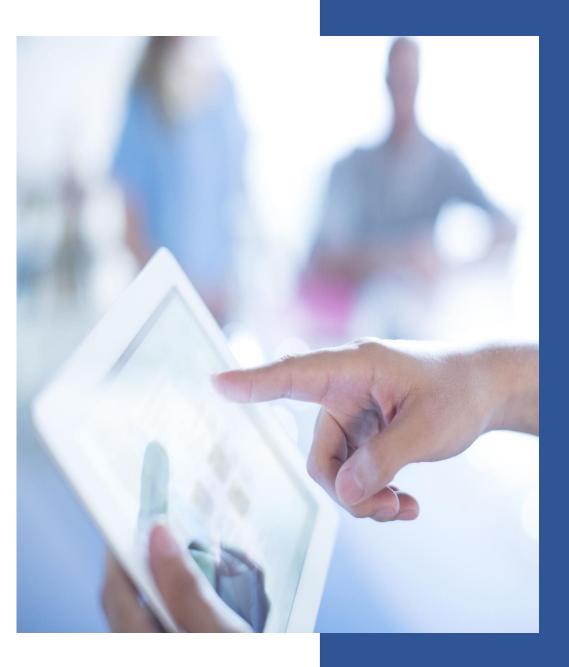
WHY USE A STATE CONTRACT?

- Makes purchasing easy

- Ensures statutory compliance

- Purchasing power

- Helps you meet set-aside goals

- Environmentally preferable products (EPPs)

WHAT DO I DO IF A STATE CONTRACT DOES NOT EXIST?

If no state contract exists

REFER TO GENERAL LETTER #71

Good or service less than $5,000? — No → Over $5,000 but less than $50,000? — No → Over $50,000 but less than $200,000? — No → Over $200,000?

Good or service less than $5,000?
- Yes ↓
  - Agency can source product to vendor of choice and make purchase

Over $5,000 but less than $50,000?
- Yes ↓
  - Agency obtains 3 quotes. Award to lowest qualified bidder
  - ↓
  - Agency creates purchase order

Over $50,000 but less than $200,000?
- Yes ↓
  - Agency posts RFQ on the State Contracting Portal. Award to lowest qualified bidder
  - ↓
  - Agency creates purchase order

Over $200,000?
- Yes ↓
  - Agency creates Core-10/DAS-BID routed to DAS for public bid/RFP and results in a contract agreement
  - ↓
  - Agency creates purchase order based on contract

WHY DO I NEED TO USE THE STATE CONTRACTING PORTAL?

CGS 4e-13 requires all executive branch agencies, including colleges and universities, to post all bids, RFPS, and all result contracts and agreements on the State Contracting Portal.

WHO DO I CONTACT AT DAS FOR HELP?

For State contract assistance, contact the Contract Specialist on CT-Source contract page

Call DAS Procurement main line:
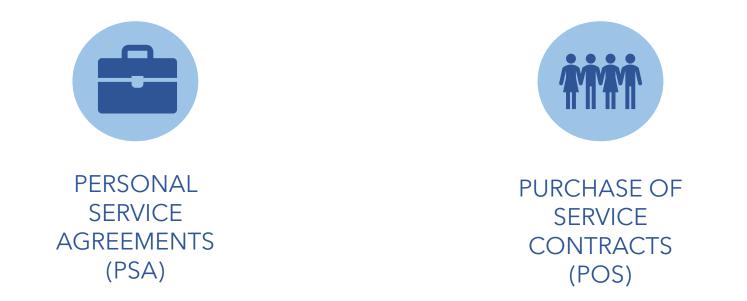860-713-5095
for further guidance

OPM/FINANCE PROCUREMENT

ROLES AND PROCESSES

WHAT IS THE ROLE OF OPM IN PROCUREMENT?

- Establishes standards for procurement of professional and human services
- Approves contracts and contract amendments in some circumstances
- Produces reports
    - Annual report on all contracting activity
    - Monthly report on competition waivers
    - Three-year procurement plans

WHAT TYPES OF CONTRACTS DOES OPM OVERSEE?

PERSONAL
SERVICE
AGREEMENTS
(PSA)

PURCHASE OF
SERVICE
CONTRACTS
(POS)

PROCURING A PROFESSIONAL OR HUMAN SERVICE

WHEN DO I NEED OPM APPROVAL?

APPROVAL REQUIRED

- Over $50,000
- Over 1 year in length
- Over $20,000 and not competitive
- Over $20,000 AND over one year with an individual
- Most amendments

NO APPROVAL REQUIRED

- Up to $20,000 and term of up to 1 year
- Up to $50,000, up to 1 year in length AND competitive

HOW DO I GET OPM APPROVAL?

1. Register vendor in Core-CT
2. Submit a requisition
3. Agency authority approves requisition in Core
4. OPM/Budget reviews and approves
5. OPM/Finance reviews and approves

POSTING RFPS AND CONTRACTS

Reminder: CGS 4e-13 requires all executive branch agencies, including colleges and universities, to post all bids, RFPS, and all resulting contracts and agreements on the State Contracting Portal.

WHO DO I CONTACT AT OPM/FINANCE FOR HELP?

①

Julia Fusfeld
Procurement Policy Development Coordinator
Julia.Fusfeld@ct.gov

②

Colin Erhardt & Lars Benson
GPL Fellows
Colin.erhardt@ct.gov
Lars.benson@ct.gov

③

Kimberly Kennison
Executive Financial Officer
Kimberly.kennison@ct.gov

WHAT IS THE GPL?

HELP CITIES AND STATES USE PROCUREMENT AND CONTRACTS AS STRATEGIC TOOLS TO MAKE PROGRESS ON THEIR PRIORITIES AND CHALLENGES

HOW THE GPL CAN HELP

- One-off technical assistance on RFP writing

- Cross-agency collaboration on RFP sprints

- Intensive support on contract implementation and management

WHAT TYPE OF PROCUREMENT IS THIS?

- Office supplies | DAS |
- Training services | PSA |
- Group homes for persons with disabilities | POS |
- Janitorial services | DAS |
- Executive search firm | PSA |
- IT consulting services | DAS |
- Substance abuse treatment services | POS |
- Guest speaker – notable personality | OPM→DAS |
- Diversity training | OPM→DAS |
- Employee assistance services | OPM→DAS |
- CTECS agreement to use Yardgoats Stadium | ? |

DAS VERSUS OPM PROCUREMENT

DAS	OPM
Goods/commodities e.g. office supplies, vehicles, IT equipment, food	Health and human services e.g. homeless shelters, substance abuse programs, childcare services
Contractual services e.g. janitorial services, food services, landscaping, snow removal	Professional services e.g. trainers, medical professionals, researchers, actuarial services
IT and telecom services including IT consulting	
Master contracts	
GL-71 exceptions	

MORE HELP CAN BE FOUND ONLINE

DAS Procurement Agency Informational Resources

DAS Procurement Agency Procurement Manual

OPM Procurement Standards

OPM RFP Template

Core-CT Job Aids

Core-CT Help Desk

FOR ADDITIONAL QUESTIONS, CONTACT US!

DAS Contract specialists – contacts on each statewide contract

DAS main procurement line: 860-713-5095

Julia Fusfeld - Procurement Policy Development Coordinator

Kimberly Kennison – Executive Financial Officer

Colin Erhardt – GPL Fellow

Lars Benson – GPL Fellow

QUESTIONS AND ANSWERS

THANK YOU!

PLEASE FILL OUT OUR SURVEY