



SACRAMENTO STATE

Guide for Vendors and Contractors

How to Do Business with

California State University, Sacramento

Procurement & Contract Services
6000 J Street
Sacramento, CA 95819-6008
Phone: 916-278-7322, Fax: 916-278-5796

<https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>

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Introduction

About California State University, Sacramento

California State University, Sacramento (the University) is located in the capital of the nation's most populous and diverse state. Reflecting the metropolitan character of the area, California State University, Sacramento is a richly diverse community. The University was established in 1947 and has grown into a metropolitan institution that supports higher education and academic excellence for over 30,000 students. California State University, Sacramento is dedicated to advancing the many social, economic, political, and scientific issues affecting the region and the state.

At California State University, Sacramento, we are constantly striving to create a sense of unity among faculty, staff, administrators, students, alumni, and community members. In pursuing the combined elements of our mission, we seek to foster a sense of pride in all who view this campus as their own – pride in the University as the institution of choice among our current students; pride among our alumni in the ongoing impact of the University education upon their lives; pride among faculty, staff, and administration in their University's achievement of excellence in teaching, learning, and scholarship; and pride in California State University, Sacramento as an asset to the community among residents of the Greater Sacramento region.

About the Procurement & Contract Services Department

California State University, Sacramento is one of twenty-three campuses which are collectively administered by The Trustees of the California State University (CSU), located in Long Beach, California.

The purpose of the Procurement and Contract Services Department is to provide the campus community the highest quality of goods and services in the most cost efficient and effective manner. The Department is responsible for executing the procurement functions and responsibilities in accordance with the delegation authority passed down by the Trustees of the CSU. The Department develops, coordinates, and implements campus-wide policies, procedures, and standards for all Procurement and Contract activities. The activities include but are not limited to personal property, services, public works and information technology.

The Procurement and Contract Services Department is dedicated to conserving public funds and conducting its procurement process in a fair, open, and competitive format. The Department is always seeking to cultivate and maintain purposeful vendor relations. Vendors are welcome to actively engage the campus for business opportunities.

Vendors are encouraged to make appointments with Buyers. We are open for business from 9:00 am - 5:00 pm, Monday through Friday, with the exception of legal and University holidays. The Procurement and Contract Services Department is located at:

California State University, Sacramento
Procurement and Contract Services
6000 J Street, Sacramento, CA 95819-6008
Modoc Hall, Room 3005
Phone: 916-278-7322, Fax: 916-278-5796

<https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>

Procurement and Contract Services - Mission Objectives and Responsibilities

The mission of the Procurement and Contract Services Department is to provide the campus community with cost efficient services with the resource level provided. The staff attempts to provide these services in a timely and courteous manner at all times. To accomplish this, policies and procedures have been established which will provide for a smooth flow of incoming requests through the procurement cycle for delivery of supplies and services.

The goal is to acquire (buy, lease, rent or lease-purchase) tangible goods and services requested by campus departments. Each Buyer seeks to accomplish this requirement with the guidelines established by policy. Contract awards are based on best value with consideration given to need, lowest economical cost consistent with quality and time, and the best interest of the University.

The Procurement and Contract Services Department responsibilities:

- Provide excellent support, service and communication for both internal and external customers.
- Create an environment that allows for full and open competition consistent with University policy and procedures. Assist in the development of specifications for solicitations of both formal and informal requirements.
- Determine appropriate procurement methodology for campus requirements.
- Endeavor to reduce the costs of the purchasing operation by working with the campus administration, faculty, staff and vendors
- Seek to implement new tools and ideas for creative procurement solutions.
- Provide an open-door atmosphere where internal and external customers can obtain training and cooperation for campus requirements.
- Maintain suitable sources of supply by facilitating vendor outreach for campus requirements.
- Support the Small Business and Disabled Business Veteran Enterprise (DVBE) participation programs.

Vendor Registration/Bid Opportunities

University Procurement & Contract Services

Buyers at California State University, Sacramento utilize BidsOnline™, a fully automated web-based vendor registration and bid management system. This online bidding system affords vendors a tool to register and compete for business opportunities by utilizing a web-based format. Some of the key features and benefits of BidsOnline™ include the ability to:

- Maintain your own profile as a new or existing vendor.
- Receive automatic email notifications for selected bid opportunities based on product and service categories.
- Search for all types of requests, addendums, bid results and awards at any time.
- Download bid documents when available.
- Receive automatic addendum notification as a bid participant.

To register and access bid opportunities, vendors must visit our website at: <https://pbsystem.planetbids.com/portal/15739/portal-home> and register themselves on BidsOnline™.

Doing Business with other California State University Procurement Offices

Once you have registered on BidsOnline™ with California State University, Sacramento, the system will update into a database. Not all CSU's use BidsOnline™ for posting bid opportunities. To contact the procurement offices for other CSUs directly, see pages 26 - 28.

State of California, Department of General Services (DGS), Procurement Division "How to Do Business with the State"

Cal eProcure is a marketplace portal for access to the California State Contracts Register (CSCR) this is your one-stop information source for state contracting opportunities. The CSCR is an online application that connects business to government, providing an easy-to-use, on-line publication which lists goods, services, construction and IT goods and services. The CSCR can be viewed at <https://www.caleprocure.ca.gov/pages/Events-BS3/event-search.aspx> .

California DGS Procurement Division
707 Third Street, 2nd Floor, West Sacramento, CA 95605
Phone: 800-559-5529 Fax: 916-375-4613
<https://www.dgs.ca.gov/PD>

Navigating Through the System

Making Contact

If you need assistance registering on our bid list, completing the required vendor forms, or need to view or print a copy of our Vendor Guide, visit our website at:

<https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>

Small Business/Disabled Veteran Business Enterprise (DVBE) Advocate Information

If your company is a registered Small Business, DVBE, and/or a prime vendor or contractor interested in doing business with the University, you are encouraged to contact the Small Business/DVBE Advocate. Each CSU and state agency have a designated Small Business/DVBE Advocate. For more information about these programs, see *Small Business Program* on pages 21-23 and/or *DVBE Program* on pages 18-23. The California State University, Sacramento Small Business & DVBE Advocate is:

Kim Holmberg
Small Business/DVBE Advocate
916-278-7403, khholmberg@csus.edu

Vendor Strategies

California State University, Sacramento acquisitions for products and services are delivered by purchase order, service order, agreement, and contract or procurement card. Vendors should *not* accept requests for products and/or services from University employees without utilizing one of the above-mentioned methodologies. Vendors are encouraged to familiarize themselves with Procurement and Contract Services Buyers by utilizing the following strategies:

- Register online @ <https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/> for opportunities (see “Contractor & Vendor Information”) then click on “New Vendor & Contractor Registration <https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>
- Notify Buyers of your business status i.e., Small Business and/or DVBE
- Keep Buyers supplied with your latest resource information and current prices.
- Keep Buyers informed of back-order situations, plant closures, impending shortages or strikes.
- Keep Buyers informed of any address, phone number, email address or contact changes.
- Maintain responsive and timely customer support.
- Deliver quality products and services to the campus community.
- Insure that all shipments are clearly marked with a purchase order number on each package-failure to do so will slow your payment opportunity.
- Include the purchase order number on all invoices and correspondence.
- Contact the Procurement and Contract Services Department for appointments.

Marketing

At California State University, Sacramento, we recognize that marketing to the government can seem like a complicated endless maze. Our goal is to remove barriers and create an environment that provides vendors a path to navigate through our system. Marketing to state government requires good marketing strategies and recognizing your target points. The road to winning contracts involves understanding the structure of our University and is an important place to start. Procurement activity for the campus is processed through the Procurement and Contract Services Department. Campus departments do not have the authority to commit University funds or to directly procure tangible goods or services without a purchase order, unless they are utilizing their procurement card for ordering tangible goods and/or services where and when allowed.

Buyers Assignment “Whom to Contact”

Vendors should refer to the University Procurement and Contract Services website at: <https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/> - click on **Staff Assignments** for the names, phone numbers and a list of commodities, services and contracts handled by each of the Buyers. Vendors should contact the appropriate Buyer before visiting the campus to discuss business opportunities.

Authority and Delegation

California State University, Sacramento is administered by the Trustees of the CSU. The Trustees are responsible for chief administration of the campuses. Their delegation is passed to the Presidents of each University to administer affairs at the individual campus. In turn, each President delegates authority and responsibility to University Administrators. Procurement and Contract Services has the sole delegation to enter into contracts for purchases, services, legal agreements and all vendor agreements. Faculty, staff and administrators outside of the Procurement and Contract Services department do not have the authority to obligate the institution.

Authority to Commit State Funds

Authority to sign purchase orders, contracts, interagency agreements, and to certify contractual documents is limited to California State University, Sacramento - Procurement Officers and Administrators who have been duly authorized in writing by the campus President and whose names and position titles are on file at the CSU Chancellors Office (Long Beach, California).

California State University, Sacramento staff, and faculty other than those mentioned above are not authorized to commit University funds.

Definition of Committing State Funds

The following actions constitute committing funds:

- Authorizing a vendor to provide a service or ship an item without an approved contract, purchase order or procurement card.
- Providing services without a contract or service order signed by and authorized team member of University - Procurement and Contract Services.
- Signing any contractual agreement naming California State University, Sacramento its employees, officers or agents as party to an agreement. This includes, but is not limited to, license agreements, facility rental contracts, Memorandums of Understanding, maintenance agreements and order forms.
- Picking up merchandise without an approved contract, purchase order, service order or procurement card is prohibited.

Bid Information

University Competitive Bid Policy

California State University, Sacramento Procurement policy is driven by the ICSU Policy Library for Contracting & Procurement. The University is committed to a policy of promoting fair and open competition for the acquisition of goods and services to meet its needs. In implementing its policies and procedures for the preparation and administration of purchase orders and contracts, the University strives to achieve fair and open competition through public advertising, notification, and outreach. We adhere to the following objectives:

1. Compliance with the intent of competitive bidding statutes as a means of protecting the public from the misuse of public funds;
2. Stimulation of competition in a manner conducive to sound fiscal practices by providing qualified bidder's fair opportunity to participate;
3. The elimination of favoritism, fraud, and corruption in the awarding of purchase orders and contracts;
4. Obtain best value for the University while complying with legislative intent.

Types of solicitations

There are several industry-standard methods that may be used for soliciting and awarding contracts.

Some of the more common ones are:

- Invitation for Bid (IFB)
- Request for Proposal (RFP)
- Request for Quotation (RFQ)

In choosing which methodology to use, the University considers the procurement objective, including, but not limited to, the requirements of the goods or services being procured, the estimated dollar value of the resultant contract, the legislative and policy requirements and what is in the best interest of the campus.

The determination for award of a contract must be in conformance with the evaluation process and methodology specified in the solicitation document. Only responsible and responsive bidders may be awarded a contract. All bids may be rejected in any case where the campus determines that the bids received are not in the best interests of the University.

Bid opportunities at the University fall into one of two categories: informal or formal.

Informal bid solicitations are generally Request for Quotations (RFQ) provided in a written or verbal format.

Formal bid solicitations are advertised on the California State Contract Register (CSCR), and posted on our bid board (public board located just outside our office). Generally formal bids utilize the following formats: Invitations for Bid (IFB) or Request for Proposal (RFP).

Other types of solicitation methods include but are not limited to Request for Information (RFI) and Request for Bid (RFB).

Awards are made to vendors based on bids/proposals that meet the needs of the solicitation, are in the best interest of the University are considered best value and are most responsive. It is the intent of the University to secure goods/services at the lowest cost and the highest practical quality and affording maximum opportunity for all vendors who wish to do business with the University.

Bid Thresholds for Non-IT Goods/Services

Acquisitions Less than \$50,000

Competition is not required for non-IT goods/services on transactions of an amount less than \$50,000 unless the campus determines that competition is necessary to develop sources, validate prices, or for other sound business reasons.

Acquisitions greater than \$50,000 and less than \$250,000 from Certified Small Business/DVBEs

Acquisitions that are estimated to be greater than \$50,000 and less than \$250,000 and result in award to a Certified Small Business, and/or DVBE are not required to be advertised in the California State Contracts Register, as long as price quotations have been obtained from two or more Certified Small Businesses, and or DVBEs.

Acquisitions greater than \$50,000 and less than \$100,000 from non-Small Business/DVBEs

Except in cases when it has been determined that only one source or that only one brand or trade name of an article will properly meet the needs of the CSU, all contracts for the acquisition of goods and or services in the amount greater than \$50,000 and less than \$100,000 may be the result of an informal non-advertised solicitation process. An informal solicitation process may provide for submittal of written or verbal quotes from vendors.

Contracts shall be awarded based on the proposal that provides the most value-effective solution to the CSU's requirements. Verbal quotes must be documented. If the award is other than to the lowest priced proposal, campuses shall document the value-based determination for making the award.

Acquisitions greater than \$100,000 from non-Small Business/DVBEs

Contracts for personal property greater than \$100,000 shall be awarded as the result of a formal solicitation process. The formal solicitation shall comply with all requirements for formal solicitation of goods and/or services. Unless waived, the formal solicitation shall be advertised in the California State Contracts Register.

Contracts for non-IT goods/services: This is a purchase that has as its sole or main purpose the buying of tangible items such as equipment, parts, supplies, or other merchandise. If any services are to be provided as well, the dollar value associated with the purchase of the goods must be greater than the dollar value of the services that will be provided. Service means any work performed by an independent contractor wherein the service rendered does not consist primarily of the acquisition of goods. This contract classification does not include contracts for the acquisition of information technology (IT) goods/services, public works project agreements, or professional service agreements in connection with a public works project.

Bid Thresholds for IT Goods/Services

Except in cases when it has been determined that only one source will properly meet the needs of the University, the following bid thresholds shall apply:

Acquisitions less than \$50,000 from Certified Small Business

Acquisitions that are estimated to be less than \$50,000 may be awarded Business without competition unless it is that competition is necessary to develop sources, validate prices, or for other sound business reasons intended to establish fair and reasonable standards.

Acquisitions equal or greater than \$50,000 and less than \$250,000 from Certified Small Business/DVBE

Acquisitions that are estimated to be greater than \$50,000 and less than \$250,000 and result in award to a Certified Small Business, and/or DVBE are not required to be advertised in the California State Contracts Register, as long as price quotations have been obtained from two or more Certified Small Businesses, and or DVBEs.

Acquisitions (IRT) equal to or greater than \$50,000, and \$500,000 or less

Acquisition of ITR requirements that are estimated to be equal to or greater than \$50,000, and \$500,000 or less may be the result of an informal solicitation non-advertised solicitation process.

An informal solicitation process may provide for submittal of written or verbal quotes from vendors.

Contracts shall be awarded based on the proposal that provides the most value-effective solution to the CSU's requirements. Verbal quotes must be documented. If the award is other than to the lowest priced proposal, campuses shall document the value-based determination for making the award.

Acquisitions greater than \$500,000

Acquisitions of IT requirements estimated to result in contracts greater than \$500,000 shall be awarded as the result of a formal solicitation process.

Information Technology (IT) Goods and Services Contract: This classification of contracts includes acquisition of goods and/or services for all electronic technology systems and services, automated information handling, system design and analysis, conversion of data, computer programming, information storage and retrieval, telecommunications which include voice, video, and data communications, requisite system controls, simulation, electronic commerce, and all related interactions between people and machines.

Information & Communication Technology

Reference: Government Code 11135, CSU Executive Order 926, CSU Coded Memo AA-2007-04, Title II of the Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12101 and following), Sections 508 of the Rehabilitation Act of 1973, as amended (Section 508)

The California State University (CSU) system launched a system-wide Information & Communication Technology (ICT) to ensure that each CSU campus follows CSU policy and federal and state laws pertaining to access to information and technology.

California State University, Sacramento is dedicated to meeting the needs of persons with disabilities in all aspects of its academic programs and services. The University recognizes the importance of making its physical facilities as well as its information technology services accessible to serve the largest possible audience and ensure the campus is accessible by everyone.

Product or Service as Unique or Proprietary Single or Sole Source

The requirement for competitive bidding of products and services in excess of \$50,000.00 shall not apply when the Senior Director/Chief Procurement Officer determines that a product or service is unique or proprietary, single or sole source which is defined as:

A product or service, the characteristics and functions of which are such that only a single product or service will properly satisfy the University's needs and all other products or services, will be unacceptable for such needs.

Advertising in the California State Contracts Register (CSCR)

It is the policy of the University to advertise in the CSCR to every extent reasonable. Contract opportunities can be found on the Contracts Register at the following website:

<https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx> (click on link to - View CSCR Ads).

Other Types of Procurement Vehicles

CSU Master Enabling Agreements

These agreements support the strategic sourcing efforts of two or more campuses by combining common requirements for specified goods and services, avoiding redundant bid solicitations and contracts, maximizing volume discounts, and reducing administrative costs. They may include Master Software/Site License Agreements, Master Service Agreements or Master Pricing Schedules. Each CSU Master Enabling Agreement may have specific conditions for its use, which may include: the extent for which competition requirements have or have not been satisfied, parties that may place orders against the CSU Master Enabling Agreement, and instructions on how to place an order.

Blanket Purchase Orders (BPOs)

These are primary source agreements which are designed to supply goods or services on an ongoing basis for a designated period of time. The agreement generally establishes prices, terms, conditions, and the period covered. Quantities or minimum sales are not required. Shipment terms are specified by the University.

Multi-Year Contracts

A contract for goods or services may be entered into for any period of time deemed to be in the best interests of the University provided the term of the contract and conditions of renewal or extension, if any, are included in the solicitation.

A multi-year contract is authorized where:

- (a) estimated requirements cover the period of the contract and are reasonably firm and continuing; and
- (b) such a contract will serve the best interests of the University by encouraging effective competition or otherwise promoting economies in University Procurement.

General Services Administration - United States (GSA) Pricing Schedules

A Multiple Award Schedule (MAS) is an agreement established between the General Services Administration (GSA) of the United States and multiple vendors for the purpose of acquiring goods and/or services under specific prices, terms and conditions. GSA agreements may be used if the GSA vendor is willing to extend the same GSA prices to the University, prices in the agreement have satisfied University's competitive bidding process, and the terms of the agreement include the terms required by California law.

California Multiple Award Schedule (CMAS) and State Master Agreements

A California Multiple Award Schedule (CMAS) and State Master Agreements are agreements established between the California Department of General Services (DGS) and multiple vendors who agree to the State of California terms and conditions and may be used by the University. Acquisitions based on CMAS or State Master Agreements shall be competitively bid so as to result in offers from three or more vendors including one small business, if available.

University Buyers access the DGS Procurement Division website at <https://www.dgsapps.dgs.ca.gov/PD/CMASSearch/> to search for appropriate CMAS contracts. If substantial savings are realized through the use of a State contract, then it is preferable to use the State contract.

CMAS contracts are based primarily on products, services, and prices from the federal General Services Administration (GSA) multiple award schedule program.

The CMAS Contractor Application Packet consists of CMAS program information, instructions, and required application documents, Contract Terms and Conditions, and Product/Services Codes. To obtain an application, contact the CMAS Unit at:

CMAS Representatives

Telephone: 916-375-4363

Fax: 916-375-4663

<https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/CMAS-Program-Overview>

Small Business/DVBE Program

DVBE Program Information

State law requires that state agencies make efforts to achieve a goal of 3% participation for disabled veteran business enterprises (DVBEs) in state contracts. Vendors are responsible for understanding the DVBE requirements and should contact the Procurement and Contract Services Department at 916-278-7322 for further clarification if needed.

DVBE PROGRAM REQUIREMENTS ARE APPLICABLE TO ALL BIDDERS. When DVBE requirements are included in the bid package, bids or proposals that have not met the DVBE requirement are considered non-responsive. Non-responsive bids/proposals are ineligible for award of state contracts.

What is a DVBE?

Disabled Veteran as used herein means a veteran of the military, naval or air services of the United States with at least a 10% service-connected disability who is a resident of the State of California.

Disabled Veteran Business Enterprise (DVBE) as used herein means a business concern certified by the Office of Small Disabled Services (OSDS) as meeting *all* of the following:

- The business is at least 51% owned by one or more disabled veterans or, in the case of a publicly owned business, at least 51% of its stock is owned by one or more disabled veterans; a subsidiary which is wholly owned by a parent corporation, but only if at least 51% of the voting stock of the parent corporation is owned by one or more disabled veterans; or a joint venture in which at least 51% of the joint venture's management and control and earnings are held by one or more disabled veterans.
- One or more disabled veterans manage and control the daily business operations. The disabled veterans who exercise management and control are not required to be the same disabled veterans as the owners of the business concern.
- A sole proprietorship, corporation, or partnership with its home office located in the United States, which is not a branch or subsidiary of a foreign corporation, foreign firm or other foreign-based business.

Does your company meet the DVBE requirement?

There are only three (3) acceptable responses to the DVBE requirement in an Invitation for Bid (IFB) or Request for Proposal (RFP):

- **My company qualifies as a DVBE.** This means the bidder is a DVBE and committed to performing not less than 3% or greater (as defined in the bid document) of the contract dollar amount with its own forces or in combination with those of other DVBEs.
- **My company does *not* qualify as a DVBE, but one or more of our subcontractors *does* qualify as a DVBE.** This means that the bidder is not a DVBE, but is committed to use DVBEs for not less than 3% or greater (as defined in the bid document) of the contract dollar amount.

- **My company does *not* qualify as a DVBE, but we have a *DVBE Utilization Plan*.** State law permits bidders bidding on contracts for materials, supplies or equipment to submit a DVBE Utilization Plan that has been approved, prior to the final bid due date, by the State Department of General Services Procurement Division.

What DVBE documentation is required?

- **If your company is a DVBE**, the University will require you to provide proof of certification by the State Department of General Services, Procurement Division, OSDS and complete the appropriate *DVBE schedule*.
- **If your company is using DVBE Subcontractor(s)**, the University will require you to provide proof of your subcontractor's certification by the OSDS and to complete the appropriate *DVBE schedule*.
- **If your company has a DVBE Utilization Plan**, the University will require you to have your plan approved by the State Department of General Services Procurement Division and complete the appropriate *DVBE schedule*.

DVBE Incentive Program

The Disabled Veteran Business Enterprise (DVBE) Participation Goal Program for State contracts is established in Public Contract Code (PCC), §10115 et seq., Military and Veterans Code (MVC), §999 et seq., and California Code of Regulations (CCR), Title 2, §1896.60 et seq.

The program mandates an incentive program to assist State agencies meeting their annual DVBE participation goals. California State University, Sacramento shall reward prime bidders for increased DVBE participation the greater the DVBE participation, the greater the incentive. Prime bidders, who meet or exceed the stated DVBE participation goal, shall receive a bidding incentive, making their bids more competitive. The more DVBE participation they receive, the higher the incentive.

A DVBE incentive will be given to bidders who provide DVBE participation. For evaluation purposes only, the University shall apply a DVBE Bid incentive to bids that propose California certified DVBE participation and confirmed by the University. The DVBE incentive amount for awards based on low price will vary in conjunction with the percentage of DVBE participation. Unless a table that replaces the one below has been expressly established elsewhere within the solicitation, the percentages and or points will apply as appropriate.

A combination of preferences or preference(s) with a DVBE incentive shall not exceed 15% or \$100,000, whichever is less.

Bidders must be considered responsive and responsible before preferences or incentives are awarded.

When applying the preferences or incentives to awards based on low price, the bid price is reduced for evaluation purposes only.

A non-small business cannot displace a California certified small business from the top-ranked position because of application, preferences or incentive.

Awards based on high score vs. awards based on low price

If a solicitation is to be awarded based on high score

A bidder who meets or exceeds DVBE participation requirements specified in the solicitation shall receive proposal evaluations points.

If a solicitation is to be awarded based on low price

A bidder who meets or exceeds DVBE participation requirements in the solicitation will receive a DVBE incentive percentage.

SAMPLE DVBE INCENTIVE BELOW

DVBE Percentage of Participation	Incentive Percentage Based Low Price Award	Incentive Points Based on High Score Award
3%	1%	1
3.01% – 3.5%	2%	2
3.51% – 4%	3%	3
4.01 – 4.5%	4%	4
4.51% - 5% & greater	5%	5

Example:

- The University posts an IFB that requires a DVBE participation of 3%.
- Bidder A responds with a \$100,000 bid and 7% DVBE participation.
- Bidder B responds with a \$97,000 bid and 3% DVBE participation.
- Bidder A is granted a 5% bid incentive, wins the award, and is paid \$100,000 for the project.

DVBE Invitation Only Bid Solicitations

State agencies may specify any amount of DVBE participation for an individual solicitation as long as they achieve their annual 3% goal. Buyers at the University may sometimes determine, based on the type and scope of the bid solicitation that *only* qualified DVBE companies will be invited to bid. If you are certified as a California State Certified DVBE and registered in the University Vendor Registration database “*BidsOnline*™”, you will automatically receive these invitations to bid. Non-DVBE companies will not receive email notifications about these bid solicitations.

DVBE Partnerships

We highly recommend that vendors begin to establish relationships with DVBE companies *before* bid solicitations are posted. Bidders have a limited amount of time to respond to bid solicitations and the bidding process will be easier if DVBE relationships have already been established. Your DVBE Advocate can help by introducing you to appropriate DVBE company representatives.

Small and Micro-Businesses Definitions

Definition of a Small Business

- An independently owned and operated business
- Not dominant in its field of operation
- The principal office is located in California
- The owners (officers if, if a corporation) are domiciled in California
- Including affiliates is either:
 - A business with 100 or fewer employees; an average annual gross receipt of \$15 million or less, over the last three tax years;
 - A manufacturer* with 100 or fewer employees; or,
 - A microbusiness. A small business will automatically be designated as a microbusiness, if gross annual receipts are less than \$5,000,000; or the small business is a manufacturer with 25 or fewer employees

* For Small Business Certification purposes, a manufacturer is a business that is both of the following:

1. Primarily engaged in the chemical or mechanical transformation of raw materials or processed substances into new products.
2. Classified between Codes 31 to 339999, inclusive, of the North American Industrial Classification System (NAICS) Manual, published by the United States Census Bureau, 2007 edition

Definition of Micro-Business

A micro-business is a small business that, together with affiliates, has average annual gross receipts of \$5,000,000 or less over the previous three years or is a manufacturer or the small business is a manufacturer with 25 or fewer employees. Micro-businesses shall be extended the same preferences and incentives applicable to certified small businesses.

For the purposes of this policy statement, small and micro-businesses shall be collectively referred to as “small businesses.”

Small Business Goal

The University supports the spirit of the Legislature's declaration as set forth in the Small Business Procurement and Contracts Act (G.C. 14835 et seq.). It also supports those goals established by the Office of Small Business and DVBE Certification (OSDS) for the extent of participation by small businesses (including micro-businesses) in the provision of goods, information technology, services to the state, and construction of state facilities.

Applying Small Business Preference

The small business preference must be applied when: 1). a responsible bidder that is not a CA certified small business, or 2). a non-small business claiming 25% CA certified small business subcontractor participation submits the lowest responsive bid. The following is an example of applying the small business preference to determine the successful bidder.

Supplier	Bid Amount	Bid after applying SB preference	Status of Bidder
A	\$19,870.00	\$18,921.25	Claims non-SB subcontractor preference and commits to 25% certified SB participation.
B	18,975.00	18,975.00	Does not claim to be SB and does not claim non-SB subcontractor participation.
C	19,520.00	18,571.25	Claims to be certified SB.

Step 1:

Calculate 5% of the net bid price of the lowest responsible and responsive bid. In this example Bidder B is the lowest responsive bid.

\$18,975.00	B's net bid price
<u> X .05</u>	Preference factor
\$ 948.75	Preference value to be applied for evaluation purposes to non-SB and SB suppliers.

Step 2:

Subtract this amount from the bid amount of Supplier "A" claiming non-SB subcontractor preference and Supplier C claiming certified SB.

Note:

Applying the SB preference formula is for evaluation purposes only and does not change the actual bids offered by any suppliers.

Step 3:

Apply the results of Step 2 as follows:

\$19,870.00 A's net bid price
- 948.75 Preference amount
\$18,921.25 A's adjusted amount after applying preference

\$19,520.00 C's net bid price
- 948.75 Preference amount
\$18,571.25 C's adjusted amount after applying preference

Results:

\$18,571.25 is less than \$18,975.00; consequently, the award is made to the certified SB.

To provide small businesses an opportunity to receive the 5% bid preference, a *Small Business Preference Form* or equivalent advisory statement shall be included in all bid solicitations for the procurement of products and services. Evidence of certification by OSDS – usually via a copy of the OSDS approval letter – is required from the bidder in order for a bid preference to be granted. For additional information on how to become a certified small business, contact the OSDS at 916-375-4940.

Special Conditions

The State is required to aid, counsel, assist, and protect, to the maximum extent possible, the interests of small business concerns in order to preserve free competitive enterprise and ensure that a fair proportion of the total purchases and contracts or subcontracts for property and services for the State be placed with such enterprises.

To provide small businesses an opportunity to request preference, the Small Business Preference Form or an equivalent advisory statement shall be included in all bid solicitations for the procurement of goods and for service agreements. Evidence of certification by OSDS is required from bidder in order for a bid preference to be granted. All certified small businesses may elect to apply a 5% percent bidder's preference that shall not exceed \$50,000 in accordance with G.C. 14835 et seq.

Bid Awards and Protests

(For Non-Public Works Acquisitions and Services)

Formal Bid Award Information

As part of the formal bid process, sealed bids and/or proposals shall be publicly opened and read at the date and time specified. After bids are opened, they shall be made available for public inspection within a reasonable time. Public inspection shall not include the disclosure of documents designated by the University to be confidential. **Bids received after the closing date and time shall not be accepted.**

As soon as practical after the bid opening, the campus shall begin the evaluation process to determine the lowest responsive and responsible bidder in accordance with the criteria for evaluation as stated in the solicitation. Deviations from requirements which do not materially impact the cost, quantity or quality of the item or service to be provided or do not directly affect the outcome of the bid award, in the opinion of the campus, may be waived.

All bids may be rejected whenever it is determined to be in the best interests of the campus. The bid document contains provisions for resolution of protests and disputes.

Protests, Disputes and Complaints (For Non-Public Works Acquisitions and Services)

The University has the final authority to resolve protests, disputes and complaints arising from the solicitation, award or performance of a contract. Protest of contract awards are limited to firms that submitted a proposal in response to a solicitation and must be on the grounds that the firm's proposal should have been selected in accordance with the selection criteria in the solicitation document. Once a firm expresses its intention to protest, the contract shall not be awarded until the protest has been withdrawn or a decision has been reached by the University.

A firm must express its intention to protest the award of a contract within five business days after release of the notification of intent to award. If notification is provided after the five-day period the notification shall be considered untimely and shall be returned to the bidder. The bidder shall provide a detailed statement of protest within ten (10) calendar days after expressing its intent to protest an award of a contract. The protesting firm must submit a full and complete written statement specifying the grounds of the protest and the facts in support thereof. If a detailed statement is not received within the 10-day period the statement shall be considered untimely and shall be returned to the bidder.

Any protest, dispute, or complaint lodged by a bidder, a vendor or contractor shall initially be addressed by the staff member in the Procurement Department who was assigned the transaction. The issue may be resolved simply by providing clarification of the bid document. If the matter cannot be resolved informally by this means, it will be elevated to the Director of Procurement.

After all factors have been analyzed, a final decision shall be issued in a timely fashion by the campus. The decision shall be in writing and shall be mailed or otherwise furnished to the bidder, vendor or contractor in such a manner as to ensure receipt. The decision of the campus is final.”

Exclusion of Vendors or Contractors from Bidding

A vendor or contractor may be removed or suspended from the University's list of potential bidders and be prohibited from participating in any of the campus bid process if there has been a failure, without good cause, to perform in accordance with the terms of a past contract with the University or with any other governmental entity. A vendor or contractor may also be removed or suspended if its performance with respect to a previously awarded purchase order or contract has been unsatisfactory. Such exclusion must remain in effect for at least 90 days after the unsatisfactory performance has been recorded, but shall not exceed a period of 360 calendar days in duration. A vendor or contractor excluded from bidding shall be relieved of the prohibition at any time after the 90-day minimum period upon demonstrating to the campus's satisfaction that the problems which resulted in the removal or suspension have been corrected.

Insurance Requirements

The University is required to maintain current insurance certificates on file for each company providing business services to the campus. Vendors or organizations providing service(s) to the University must have a current certificate of insurance and **endorsement page** listing California State University, Sacramento as additionally insured on file in our office. The certificate of insurance and endorsement page must meet the requirements listed below. Services may not be performed until the insurance documents have been provided to the University Procurement and Contract Services Department.

Upon receipt of a request for insurance from the campus, vendors should pass the insurance requirements along to their broker or insurance provider.

The requirements listed below constitute the Contract Insurance requirements unless special conditions warrant a modification to the documentation due to minimal risk or elevated risk.

Throughout the life of a Contract, the vendor shall pay for and maintain in full force and effect with an insurance company(s) (Company) admitted by the California Insurance Commissioner to do business in the State of California and rated not less than "A: VII" in Best Insurance Key Rating Guide.

Proper Address for Certificates, Endorsements and Notices shall be:

California State University, Sacramento
Procurement and Contract Services
6000 J Street
Sacramento, CA 95819-6008

Upon notification of receipt by the University of a Notice of Cancellation, major change, modification, or reduction in coverage, the Contractor shall immediately file with California State University, Sacramento a certified copy of the required new or renewal policy and certificates for such policy.

If at any time during the life of the Contract or any extension, the vendor fails to maintain the required insurance in full force and effect, all work under the Contract shall be discontinued immediately and all payments due or that may become due to the vendor shall be withheld until acceptable replacement coverage notice is received by the University. Any failure to maintain the required insurance shall be sufficient cause for the University to terminate the Contract. In the event of insurance cancellation, the University reserves the right to purchase insurance or insure (or self-insure) for the above required coverages at the vendor's full expense.

If the vendor should subcontract all or any portion of the work to be performed in this contract, the vendor shall cover the subcontractor, and/or require each subcontractor to adhere to all subparagraphs of this Insurance Requirements section. Similarly, any cancellation, lapse, reduction or change of subcontractor's insurance shall have the same impact as described above.

Receiving Purchase Orders

Supplier Obligations

Receiving a purchase order from the University carries with it the obligation to supply the ordered products and/or services at the agreed upon price, at the promised time, and without the need for Buyer intervention, renegotiation or continued expediting. Full performance of contractual obligations will render vendors a favorable evaluation and opportunities for further participation in our purchasing program. Our expectations:

- Quality customer service
- Dependable products and services
- Timely delivery
- Competitive prices
- No substitutions without the approval of the buyer and amendment of the purchase order, service order and or contract.
- Good communications
- Timely resolution of claims
- Compliance with procurement, shipping and invoicing procedures

Authorized Purchasing Transactions

Vendors may be presented with four different types of authorized procurement transactions: purchase orders, service orders, agreements, or contracts processed by the University Procurement and Contract Services Department. In addition to those four, procurement card orders are processed by authorized University employees throughout the campus. The following are descriptions of each of these procurement methods.

1. **Purchase Orders, Service Agreements and Contracts:** Purchase orders, service orders, agreements, and contracts are required for any purchase not eligible as a procurement card transaction. The activities supporting purchase orders, service orders, agreements, and contracts are performed by University Buyers who have the sole authority to approve purchases. University Buyers are presented with a purchase requisition from campus departments. The Buyer review and evaluate the products or services requested by campus departments after ensuring that all policies, authorizations, and procedures, including competitive solicitations, have been obtained. Vendors shall not accept purchase requisitions for fulfillment of orders. The purchase requisition must be converted by the Procurement and Contract Services Department to a purchase order, service order, agreement, or contract to establish a University obligation of funds.

2. **Procurement Card:** Vendors may be presented with a procurement request using an official campus Procurement Card. The Procurement Card is designed to be used by authorized University employees to purchase routine goods generally costing up to \$5,000 (including shipping, handling and tax). While full liability rests with the University, the cardholder whose name is imprinted on the card is responsible for all purchases. This procurement card system benefits the University and vendors through:

- Prompt payment to vendors.
- Elimination of unnecessary purchase orders and invoices.
- Distribution of low value purchase authority.

Just like any other credit card, it can be swiped at the vendor site or used to place orders by telephone and on the internet by giving the card account number to the vendor. An invoice or receipt is required from the vendor that identifies the detail of the items being purchased and shipped. The bank bills the University for the “NET Amount of all authorized transactions processed. Each Procurement Card has a pre-set spending limit that may not be exceeded under any circumstances. Procurement Card restrictions and prohibited uses can be viewed on the campus Procurement and Contract Services website (<https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>).

No personal expenses are to be charged to the procurement card at any time or for any reason whatsoever.

Vendor Data Record (Form 204)

All vendors doing business with California State University, Sacramento must complete the *Vendor Data Record* (State of California Standard Form 204) available on the University Accounts Payable website:

<https://onbaseform.csus.edu/obforms/eforms/aba/finance/pub/VendorData204.aspx>

Submitting a completed 204 form is a mandatory requirement prior to doing business with any state agency. Information on this form will be used to prepare Information Returns (Form 1099) and for withholding on payments to nonresident vendors. Additionally, the address provided will be used as a default remittance address for check disbursement.

If any of the information submitted on the 204 form changes, it is the responsibility of the vendor to notify the University and to submit a new form as soon as possible. **Invoice payments will not be issued to any vendor who has not submitted a 204 form.** Even if you have submitted a 204 form to another state agency, you must still submit a 204 form to California State University, Sacramento.

Recycled Content Certification

The University requests all vendors to certify in writing the recycled content of the products sold or offered to the campus. Certification of the amount of recycled content within each product may be either

- (a) a minimum percentage of post-consumer material and secondary material, or
- (b) exact percentage of post-consumer material and secondary material. The Recycled Content Certification form is located at: <https://www.csus.edu/administration-business-affairs/internal/aba-forms.html#procurement-contract-services> and scroll down to the Procurements and Contracts section.

Shipments

It is important that vendor shipments are addressed correctly. Failure to identify the shipment properly may be cause for refusal or delayed payment. Partial shipments are not desirable and are not encouraged unless shortness of supply demands split shipments. All shipments must include a packing slip detailing the contents of the shipment. Shipments against purchase orders, procurement card orders and direct payment acquisitions should be addressed as follows:

California State University, Sacramento
Attn: Central Receiving/Purchase Order #_____
6000 J Street
Sacramento, CA 95819-6117

The University Central Receiving Department phone number is 916-278-6274.

Sales Tax

California State University, Sacramento is NOT exempt from state sales or use tax. By policy, the University generally requires the vendor to pay all contributions, taxes and premiums payable under federal, state and local laws measured upon the payroll of employees engaged in the performance of work under a contract, and all applicable sales, use, excise, transportation, privilege, occupational and other taxes applicable to products and supplies furnished or work performed.

Invoices

All vendor invoices to the University must follow University Accounts Payable protocol. Below is a link to the University payment process:

<https://www.csus.edu/administration-business-affairs/internal/accounts-payable/getting-paid.html>

Contact Information for All CSU Campuses

California State University, Chancellor's Office

Contract Services & Procurement

Phone: 562-951-4586

Website: <https://www.calstate.edu/csu-system/doing-business-with-the-csu/contract-services-and-procurement>

California State University, Bakersfield

Procurement & Contract Services

Phone: 661-654-3181

Website: <https://www.csub.edu/bas/fiscal/procurement/index.html>

California State University, Channel Islands

Procurement & Support Services

Phone: 805-437-8592

Website: <https://www.csuci.edu/financial-services/procurement/>

California State University, Chico

Procurement & Contract Services

Phone: 530-898-4636

Website: <https://www.csuchico.edu/purc/>

California State University, Dominguez Hills

Phone: 310- 243-3799

Website: <https://www.csudh.edu/procurement/procurement-contracts/>

California State University, East Bay

Procurement & Support Services

Phone: 510-885-3000

Website: <https://www.csueastbay.edu/procurement/>

California State University, Fresno

Procurement & Support Services

Phone: 559.278.2111

Website: <https://adminfinance.fresnostate.edu/procurement/>

California State University, Fullerton

Contracts & Procurement

Phone: 657-278-2411

Website: <https://adminfin.fullerton.edu/cp/>

Humboldt State University

Contracts, Procurement & Accounts Payable

Phone: 707-826-3512

Website: <https://procurement.humboldt.edu/>

California State University, Long Beach

Procurement & Support Services

Phone: 562-985-4296

Website: <https://www.csulb.edu/financial-management/procurement-services>

California State University, Los Angeles

Procurement Contracts & Support Services

Phone: 323-343-3480

Website: <https://www.calstatela.edu/procure>

California Maritime Academy

Contracts & Procurement

Phone: 707-654-1086

Website: <https://www.csum.edu/fiscal-services/procurement/>

California State University, Monterey Bay

Purchasing

Phone 831-582-3000

Website: Website: <https://csumb.edu/finance/business-and-support-services/procurement/>

California State University, Northridge

<https://www.csun.edu/procure/>

Phone: 818 677-2301

Website: <https://www.csun.edu/procure/>

California State Polytechnic University, Pomona

Procurement & Support Services

Phone: 909- 869-3400

Web: www.cpp.edu/procurement/index.shtml

California State University, Sacramento

Procurement & Contract Services

Phone: 916-278-7322

Website: <https://www.csus.edu/administration-business-affairs/internal/procurement-contracts/>

California State University, San Bernardino

Procurement and Contracts (Purchasing)

Phone: 909-537-5142

Website: <https://www.csusb.edu/procurement>

San Diego State University

Procurement and Payments

Phone: 619-594-5243

Website: <https://bfa.sdsu.edu/financial/procurement>

San Francisco State University
Procurement & Support Services
Phone: 415-338-1111
Website: <https://procurement.sfsu.edu/>

San José State University
Procurement & Support Services
Phone: 408-924-1558
Website: <https://www.sjsu.edu/fabs/services/p2p/contact-us.php>

California State Polytechnic University, San Luis Obispo
Strategic Business Services
Phone: 805-756-2232
Website: <https://afd.calpoly.edu/sbs/>

California State University, San Marcos
Procurement Operations
Phone: 760-750-4000
Website: <https://www.csusm.edu/procurement/>

Sonoma State University
Financial Services/Contracts & Procurement
Phone: 707.664.2880
Website: <http://finance.sonoma.edu/procurement>

California State University, Stanislaus
Financial Services/Purchasing
Phone: 209-667-3122
Website: <https://www.csustan.edu/financial-support-services-gateway/suppliers-visitors/buying-paying-contacts>

Directions



From Points East

Via I-80 (Auburn, Reno)

1. Take I-80 west into the City of Sacramento.
2. At the split take Business 80 west. (Capitol City Freeway)
3. Proceed to the J Street exit and turn left onto J Street.
4. Take J Street approximately three miles through East Sacramento to the north entrance of campus.
5. Turn right into the north gate at the intersection of J Street and Carlson Drive.
6. On the right-hand side of the roadway is the Information Booth, where a campus directory and further assistance is available.

Via Highway 50 (Folsom, South Lake Tahoe)

1. Take Highway 50 west into the City of Sacramento
2. Follow signs to the University exit.
3. Proceed to the Howe Ave/Power Inn Road Exit and drive straight through the intersection onto College Town Dr.
4. Take College Town Dr. approximately .5 miles to the south entrance of Sacramento State.
5. Proceed through the third stop light at State University Dr.
6. Just past the intersection, on the right-hand side of the roadway is an information booth where a campus directory and further assistance is available.

From Points South:

Via I-5 (Stockton, Los Angeles)

1. Take I-5 north into the City of Sacramento
2. Follow signs to the Highway 50 east exit.
3. Merge onto Highway 50 and proceed east to the Howe Ave/Power Inn Road exit.
4. Stay to the far right while exiting the highway and merge onto Hornet Dr.
5. Turn left when the road dead-ends at College Town Dr.
6. Proceed through the second stop light at State University Dr.
7. Just past the intersection, on the right-hand side of the roadway is an information booth where a campus directory and further assistance is available.

From Points North:

Via I-5 (Woodland, Redding, Sacramento International Airport)

1. Take I-5 south into the City of Sacramento
2. Follow signs to the Highway 50 east exit.
3. Merge onto Highway 50 and proceed east to the Howe Ave/Power Inn Road exit.
4. Stay to the far right while exiting the highway and merge onto Hornet Dr.
5. Turn left when the road dead-ends at College Town Dr.
6. Proceed through the second stop light at State University Dr.
7. Just past the intersection, on the right-hand side of the roadway is an information booth where a campus directory and further assistance is available.

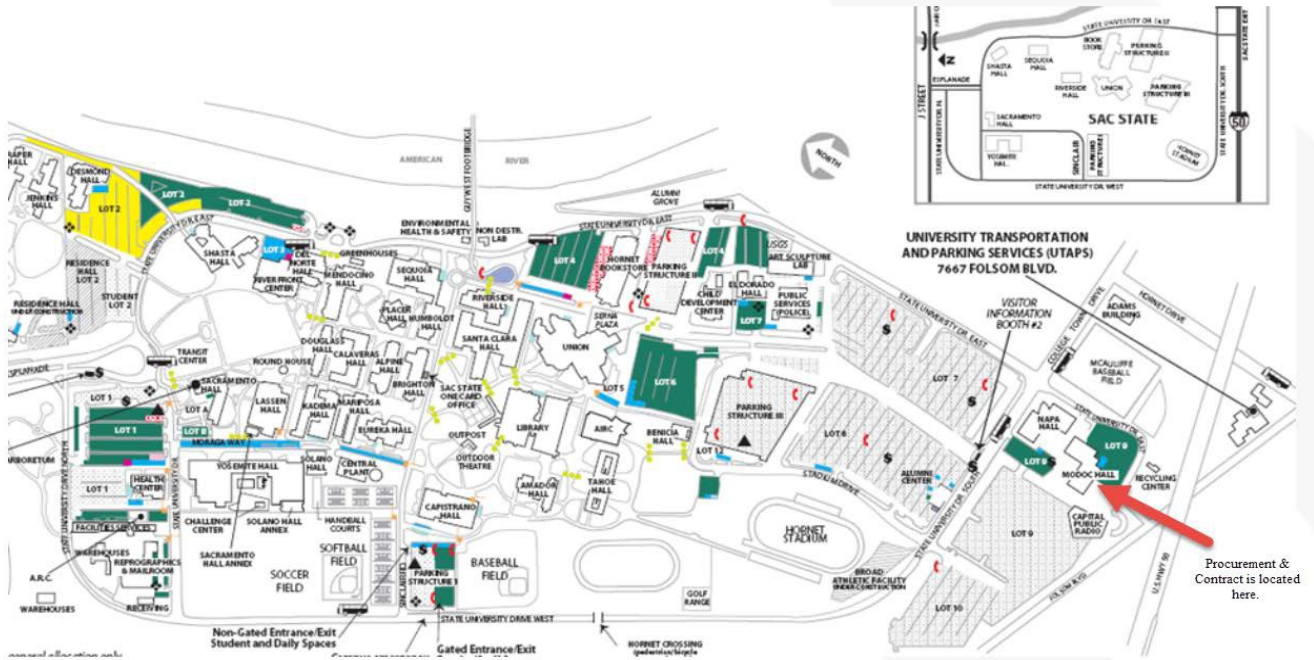
From Points West:

Via I-80 (Davis, San Francisco)

1. Take I-80 east towards the City of Sacramento.
2. At the split of I-80 and Bus 80/Hwy 50 in West Sacramento, stay straight on Bus 80/Hwy 50 and proceed into Sacramento.
3. After crossing the Sacramento River, I-80 becomes Highway 50, proceed east on 50 to the Howe Ave/Power Inn Road exit.
4. Stay to the far right while exiting the highway and merge onto Hornet Dr.
5. Turn left when the road dead-ends at College Town Dr.
6. Proceed through the second stop light at State University Dr.
7. Just past the intersection, on the right-hand side of the roadway is an information booth where a campus directory and further assistance is available.

CAMPUS MAP

Campus Map



The Procurement and Contract Services Department is located at:

6000 J Street
Sacramento, CA 95819
Modoc Hall Room 3005
916-278-7322

<https://www.csus.edu/administration-business-affairs/internal/aba-forms.html#procurement-contract-services>