

Quick Reference Guide State Purchasing/Contracting Rules

CONTRACT TYPE SERVICES NEEDED	RCW	POLICIES AND PROCEDURES	OVERSIGHT AGENCY & CONTACT	COMPETITION REQUIRED?	FILING/REPORTING TO OVERSIGHT AGENCY?	NOTES/COMMENTS
Goods <i>See IT purchased goods on next page.</i>	43.19	Washington Purchasing Manual	Department of Enterprise Services (DES), Office of State Procurement (OSP) Steve Krueger 360.407.9400	YES \$5,000 = informal \$50,000 = formal (before trade-in allowance, sales tax and freight charges)	Reporting to DES for: <ul style="list-style-type: none"> • Emergency Purchases • Best Buy Purchases • Specific Authority • As requested 	Three types of authority – General, Specific, and Limited Agencies acquire through: <ul style="list-style-type: none"> • State contracts, • Single purchase events, • WSCA contracts, • Master personal service contracts (DES), • Central Stores, and • State Surplus.
Purchased services <i>“Purchased services” mean services provided by a vendor to accomplish routine, continuing and necessary functions...</i> <i>See IT purchased services on next page.</i>	43.19	Washington Purchasing Manual	DES, OSP Steve Krueger 360.407.9400	YES \$5,000 = informal \$50,000 = formal (before trade-in allowance, sales tax and freight charges)	Reporting to DES for: <ul style="list-style-type: none"> • Emergency Purchases • Best Buy Purchases • Specific Authority • As requested 	Three types of authority – General, Specific, and Limited

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IT goods/ equipment and purchased services	43.105	Office of Financial Management (OFM), Office of the Chief Information Officer (OCIO) State Technology Manual	OCIO Contact list	YES \$10,000 = informal \$100,000 = formal \$250,000=more formal	Acquisition of IT resources that are part of a project rated above oversight level 1 (per the oversight matrix in the <i>State Technology Manual</i>), must obtain approval from OCIO or the Technology Service Board (TSB). See the oversight matrix .	Master contracts for various IT products and services are available through DES.
Personal services <i>“Personal services” means professional or technical expertise provided to conduct a study, project, task or other work statement.</i> <i>See IT personal services on next page.</i>	39.29	Statewide Administrative and Accounting Manual (SAAM) Chapter 15	DES, Enterprise Contracts Becci Riley 360.407.8149	YES \$5,000 = informal \$20,000 = formal	YES \$5,000 & above = sole source contracts/ amendments \$5,000 & above = emergency contracts \$20,000 & above = competitive contracts/ amendments. Various reporting requirements.	Filing and reporting are done through the Personal Service Contracts Database (PSCD) . Master personal service contracts are available for use:

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<p>IT personal services</p> <p><i>IT personal service acquisitions must comply with both DES and OCIO requirements.</i></p>	<p>39.29</p> <p>43.105</p>	<p>SAAM Chapter 15</p> <p>OCIO State Technology Manual</p>	<p>DES, Enterprise Contracts Becci Riley 360.407.8149</p> <p>OCIO Contact list</p>	<p>YES \$5,000 = informal \$20,000 = formal</p>	<p>YES \$5,000 & above = sole source contracts/ amendments \$5,000 & above = emergency contracts \$20,000 & above = competitive contracts/ amendments.</p> <p>Various reporting requirements– see requirements for IT goods/ equipment and purchased services, above.</p>	<p>Filing and reporting are done through the PSCD.</p> <p>IT Professional Services (ITPS) master contracts available through DES.</p>
<p>Client services</p> <p><i>“Client services” means services provided directly to state agency clients.</i></p>	<p>39.29</p>	<p>SAAM Chapter 16</p>	<p>DES, Enterprise Contracts Becci Riley 360.407.8149</p>	<p>NO but is still advisable or may be required by funding source</p>	<p>YES <i>Annual Contract Procedures Report</i> (agencies report total number and total dollar value of client service contracts)</p>	<p>Some state agencies use the Client Service Contracts Database (CSCD) to coordinate client service contracting activities (agencies that use CSCD: DSHS, DOC, CTED, DOH, OSPI, DVA, L&I, ESD, and MIL)</p>

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Janitorial and carpet cleaning	43.19		DES, Facilities Division, Facilities Support Group Cory Noffsinger 360.902.0961	DES provides the service	NO	
<i>(a) in State buildings on Capital Campus</i>	43.82.010			----- YES \$3,600 = informal \$50,400 = formal	----- NO	
<i>(b) in State buildings not on the Capital Campus</i>		----- Lease agreement with DES	----- Pattie Williams 360.725.0005	-----	-----	
<i>(c) DES-owned buildings outside Thurston County</i>		----- DES Leased Space Requirements	Property Management Carrie Martin 360.407.9323	----- YES—if lessee is contracting for the service—use of Purchasing Manual and DES procurement policies and procedures. Otherwise, if lessor is providing the service as part of lease agreement, lessor determines how to procure such services.	----- YES, to DES, OSP	----- Service could be provided as part of lease agreement by lessor, or by lessee (tenant agency). If it is a part of the lessor’s responsibilities, he/she must follow the requirements listed in Exhibit J of the lease. Once DES executes a lease on behalf of an agency, agency assumes administration of the lease and the services identified in the lease. DES may be consulted at various times. If the lessee is responsible for the janitorial, agencies use Mandatory Use Contracts or Master Contracts .
<i>(d) Non-state owned (leased) buildings</i>		Service can be provided by lessor or lessee—specify in the lease agreement. If lessee (tenant agency) responsibility-then Washington Purchasing Manual .	Real Estate Services Howard Cox 360.407.9283 OSP Steve Krueger 360.407.9400			

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Interagency/ interlocal	39.34			NO	Post on agency website per RCW 39.34.040	
Civil service competitive contracting	41.06.142	WAC 236-51 Washington State Competitive Contracting Manual	DES, OSP Steve Krueger 360.407.9400	YES No minimum threshold	NO	Guidance and help for agencies
Grants	Various authorities	Varies	Varies	Varies	Varies	If federal grant, follow federal rules. If state grant, follow rules set forth in statute or agency policies and procedures.
Leases, buildings	43.82	DES policies and procedures OFM policies and procedures	DES, Facilities Division, Real Estate Services Howard Cox 360.407.9283 OFM, Facilities Oversight Amy McMahan 360.902.9824	NO	Yes, annual report to OFM and Legislature Leases that meet or exceed specific criteria require the approval of OFM .	DES policies and practices for real estate activities do not follow the “low bid” concept of the typical procurement for goods and services approach. Leased space is acquired through an open, competitive process and cost is a factor in selection.

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Acquisition/disposal of buildings or property	43.82.010	DES policies and procedures	DES, Facilities Division, Real Estate Services Howard Cox 360.407.9283	YES—in part--see comments DES acts on behalf of other agencies.		In disposition of property, DES policy is to offer to sell to other state agencies, and then political subdivisions first, and after no responsive offers, sell to private sector
Printing, binding and stationery work	43.78	Agencies shall consult with DES on how to choose more economic and efficient options to reduce costs for every print and binding job, regardless of dollar amount.	DES, Printing and Imaging Services Jeff Peterson 360.570.5555	Agencies, boards, commissions, and institutions of higher education requiring the services of a print shop may use DES without competition. Otherwise, all such services must be competitively solicited to include posting on WEBS.	Results of all solicitations are to be provided to DES Printing and Imaging Services upon announcement of award.	Master personal service contracts available for print assessments. DES shall print all materials that contain sensitive or personally identifiable information not publicly available unless it can be more economically to contract with a private vendor. The vendor shall enter into a confidentiality agreement to protect the information with DES Printing and Imaging Services.
<i>Managed Print Contracts</i>	43.19.733					
<i>Print shop services – Bid solicitations – Confidential Information</i>	43.19.736	Contact your DES Printing Customer Service Representative for consult.				
<i>Reducing Costs – Consult with Department</i>	43.19.739					
<i>Use of Envelopes</i>	43.19.745					
<i>Contracts for Out-Of-State Work</i>	43.19.754					

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Vending and cafeteria services	74.18.200-230	WAC 67-35-160	Department of Services for the Blind (DSB), Business Enterprise Program (BEP) Jeanne Gallo 360.725.3844	DSB is responsible for establishing the state contract for vending machine service in public buildings	None	Agencies requesting vending machine service and/or food service operations, like cafeteria services, snack bar or espresso service, need to call DBS first before proceeding with these services.
Public works, energy performance base, including engineering and architectural services	39.04	Conditions of the Agreement Design Guidelines and Construction Standards	DES, Division of Engineering & Architect Services Roland Orr 360.407.9361	YES Except emergencies: All design, construction and energy services contracts require competition.	Reporting to DES as requested. MWBE/Apprentice participation quarterly. Reporting A/E agreements to DES through the PSCD .	Forms and reference documents
Works of art	43.19.455		Washington Arts Commission Lou MacMillan 360.586.5350			Art in Public Places Program

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Financial institutions/ cash management contracts (banking, credit/debit processing, lockboxes, etc.)	43.08.015	SAAM Chapter 40 SAAM Chapter 65	Office of the State Treasurer (OST) Ryan Pitroff 360.902.8917	Usually a competitive process is used to select contractors. OST decides when competition is appropriate for these services.		Master (mandatory use) contracts for merchant bank cards, lockbox, depository services Some agencies (i.e. community colleges) may receive delegated authority.
Purchase cards, gasoline credit cards and travel cards	43.19.185	WAC 236-48-250 to 253 SAAM Chapter 45 – Purchase Cards SAAM Chapter 10 – Travel	DES, OSP 360. 902.7400			
Lease purchase of equipment and real estate	39.94	WAC 210-03	OST 360.902.9000			The state Finance Committee has delegated administrative responsibility for the Lease/Purchase Program to the Debt Management Team in the Office of the State Treasurer. State agencies are required to go through the Treasurer's Lease/Purchase Program when financing real estate or equipment.