

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 See IT Purchased Goods below	43.19	Washington Purchasing Manual www.ga.wa.gov/PCA/Manual. htm	Department of General Administration (GA), Office of State Procurement (OSP) Steve Krueger 360 902-7233	YES \$3,500 = informal \$49,000 = formal (before trade-in allowance, sales tax and freight charges)	Reporting to GA 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 (OFM), · Central Stores and · State Surplus
Purchased services “Purchased services” mean services provided by a vendor to accomplish routine, continuing and necessary functions... See IT Purchased Services below	43.19	Washington Purchasing Manual www.ga.wa.gov/PCA/Manual. htm	GA, OSP, Steve Krueger 360 902-7233	YES \$3,500 = informal \$49,000 = formal (before trade-in allowance, sales tax and freight charges)	Reporting to GA 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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This chart does not include information about agency specific procurement authority.

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IT Goods/ Equipment and Purchased Services	43.105	Information Services Board (ISB) <i>Information Technology (IT) Investment Policy and Standards</i> http://isb.wa.gov/policies/investment.aspx	Department of Information Services (DIS) Technology Management Consultant Assignments List http://isb.wa.gov/policies/consultantlist.aspx	YES \$10,000 = informal \$100,000 = formal \$250,000=more formal	Section 903 Consult required prior to purchase http://dis.wa.gov/sect903/index.htm Acquisition of IT resources that are part of a project rated above oversight level 1 (per the oversight matrix in the <i>IT Investment Standards</i>), must obtain approval from DIS/MOSTD or the ISB. See oversight matrix - http://isb.wa.gov/policies/portfolio/101S.doc#_Toc77412179	Agencies have various levels of delegated authority. See <i>IT Investment Policy</i> , p.3. http://isb.wa.gov/policies/investment.aspx Master contracts for various IT products and services are available through DIS. See the DIS TechMall - http://techmall.dis.wa.gov/master_contracts/mc.aspx

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Personal Services “Personal services” means professional or technical expertise provided to conduct a study, project, task or other work statement. See IT Personal Services below	39.29	OFM Statewide Administrative and Accounting Manual (SAAM) Chapter 15 http://www.ofm.wa.gov/policy/15.htm	Office of Financial Management (OFM), Laura Wood , 360 725-5259	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) on OFM’s website Master contracts through GA, DOP, DIS, and the Dept of Printing
IT Personal Services <i>Note: IT Personal Services acquisitions must comply with both OFM and DIS requirements.</i>	39.29 & 43.105	OFM Statewide Administrative and Accounting Manual (SAAM) Chapter 15 http://www.ofm.wa.gov/policy/15.htm ISB <i>IT Investment Policy and Standards</i> http://isb.wa.gov/policies/investment.aspx	OFM Becci Riley , 360 725-5514 DIS Technology Management Consultant Assignments List http://isb.wa.gov/policies/consultantlist.aspx	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– see requirements for IT Goods/Equipment and Purchased Services, above.	Filing and reporting are done through the Personal Service Contracts Database (PSCD) Agencies have various levels of IT delegated authority. See <i>IT Investment Policy</i> , p.3. http://isb.wa.gov/policies/investment.aspx IT Professional Services (ITPS) Master contracts available through DIS. See the DIS TechMall - http://techmall.dis.wa.gov/services/itps.aspx

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				Agreement, lessor determines how to procure such services.		
Interagency/Interlocal Agreement	39.34			NO	Post on agency website	
Civil Service Competitive Contracting	41.06.142	WAC 236-51 http://www.ga.wa.gov/competitivecontracting	GA, OSP, Steve Krueger 360 902-7233	YES No minimum threshold	NO	Guidance and help for agencies available on line at http://www.ga.wa.gov/competitivecontracting
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	43.82.010 SHB 2366	GA policies and procedures OFM policies and procedures	GA-Facilities Division- Real Estate Services Group, Bob Bippert , 360 902-7395 OFM-Facilities Oversight, Tom Saelid , 360 902-0562	YES	Yes, annual report to OFM and Legislature	GA 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 though an open, competitive process and cost is only a (albeit major) factor in selection (approximately 30% of the determination).

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Acquisition/disposal, buildings, property	43.82.010	GA Policies and procedures	GA Facilities Division Real Estate Services, Bob Bippert , 360 902-7395	YES—in part--see comments GA acts on behalf of other agencies.		In disposition of property, GA 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, & Stationery work	43.78	Contact your Department of Printing Customer Service Representative for all printing jobs. The Department of Printing does not delegate the print authority to any state agency.	Department of Printing Jeff Peterson , 360 570-3061			Master personal service contracts available for print assessments. Master contract for Quick Printing for agencies outside the Thurston County area (account needs to be set up by the Department of Printing prior to agency using the contract).
Vending and Cafeteria Svc	74.18.200-230	WAC 67-35-160	Dept of Services for the Blind (DSB) Liz Tunison , 360 725-3845	DSB is responsible for establishing state contract for vending machine service in public buildings and overseeing service	None	Agencies requesting vending machine service and/or food service operations, like cafeteria services, snack bar or espresso service, need to call DSB first before proceeding with these services.

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Public Works, Energy Performance Base, including E&A	39.04	Conditions of the Agreement (DESIGN) General Conditions for State Facility Construction (CONSTRUCTION) http://www.ga.wa.gov/Construction/3FormsRef.htm	GA, Division of Engineering & Architect Svcs, Roland Orr 360 902-7239	YES Except Emergencies: All Design, Construction & Energy Services Contracts Require Competition	Reporting to GA as requested. MWBE/Apprentice Participation Quarterly. Reporting A/E agreements to OFM,	
Works of Art	43.19.455		Washington Arts Commission, Lou MacMillan 360 586-5350			
Financial institutions/cash management contracts (Banking, credit/debit processing, lockboxes, etc.)	43.08.015	OFM Statewide Administrative and Accounting Manual (SAAM) policies Chapters 40 and 65 http://www.ofm.wa.gov/policy/40.htm http://www.ofm.wa.gov/policy/65.htm	Office of the State Treasurer (OST) Jackie Biss 360 902-8914 or 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.

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Purchase Cards Gasoline Credit Cards Travel Cards	43.19.185	WAC 236-48-250 to 253 SAAM Chapter 45 – Purchase Cards, Chapter 10 – Travel	GA, OSP, 360 902-7400			
Lease Purchase of Equipment and Real Estate	39.94	WAC 210-03 http://tre.wa.gov/BondDebt/bond_state-lp.htm	OST, Real Estate, Noah Crocker, 360 902-9020 Equipment, Wendy Kancianich, 360 902-9022			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.