

# Office of State Procurement Updates



## News You Can Use

# Topics of Discussion

- Discuss ways our Office is trying to serve you better
- Staying in compliance with the Code – Model School District Code Highlights
- Who's On First? Identifying roles and responsibilities
  - Procedure Manuals
- Public Notice
  - Sole Sources
  - Emergency Procurements
  - Spending Thresholds



# We've been busy...

Last Fiscal Year our office issued a lot of contracts –

462 State Term Contracts: \$1,192,170,923.32

297 Agency Contracts: \$ 783,669,001.25

Total 759 Contracts Awarded: \$1,975,839,924.57

We issued 213 Solicitations and Awarded 252 Solicitations

Solicitations Issued					
BVB	FPB	IFB	RFP	RFQ/RFI	Total
9	27	93	80	4	213
Solicitations Awarded					
BVB	FPB	IFB	RFP	NASPO/Other	Total
5	51	84	91	21	252

# We've expanded our offerings...

We issued and awarded 13 Solicitations for completely new state term contracts that we have never offered before.

We made significant changes/improvements to most of the other contracts we resolicited last year as well.





# Always verify if your needs can be met through State Term Contracts

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Notice To Our Users: For information regarding COVID Rental Assistance click [here](#).



Statewide Term Contracts



Office of State Engineer (Construction)



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**SITE MENU**

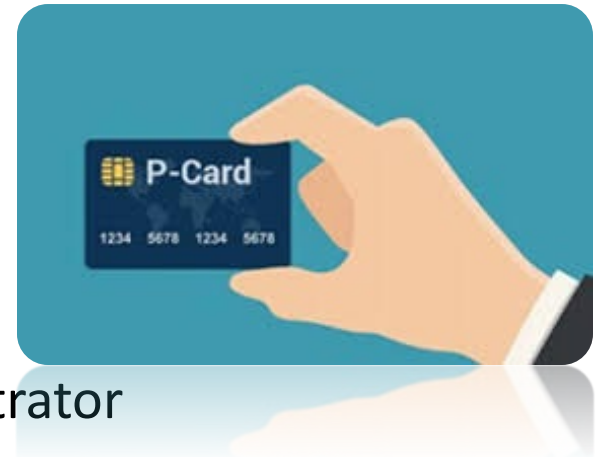
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**LINKS**

[National Association of State Purchasing Officials \(NASPO\)](#)  
[National Institute of Governmental Purchasing \(NIGP\)](#)  
[Report Fraud \(Office of Inspector General\)](#)  
[South Carolina Enterprise Information System \(SCEIS\)](#)

# Goods & Services State Term Contract Updates

- Internal Audit of **P-Card** Administrators continues
- Please send the following information of your current administrator(s) and back-up administrator(s) to Portia Davis at [pcard@mmo.sc.gov](mailto:pcard@mmo.sc.gov).
  - Name (Last, First)
  - Phone
  - Email
  - Program Administrator or Back-Up Administrator
  - Effective Date
  - Agency Website





# DisPatcheS Newsletter

[www.procurement.sc.gov](http://www.procurement.sc.gov)

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## THE DIVISION OF PROCUREMENT SERVICES

## The Now *Monthly*(!) Statewide Term Contract Town Hall

By Michael Speakmon, CPPO

The first Town Hall we conducted on March 13, 2023 was a great success. Ninety-nine people registered for the event and 55 actually showed up. The first Town Hall was such a hit that we have decided to make them a monthly event. Based on the conversations we had during the initial Town Hall, in future events we will be:

**Providing Updates to STCs that didn't make DisPatches.** – Sometimes we don't get an update in time to meet the publishing deadline.

**Highlighting a contract to discuss issues we may have been/are having and how to resolve them.** We not only get questions from you, the users, we also get them from the Contractors, so we want to make sure everyone is on the same page.

**Having both Goods & Services & IT Representation.** Mikey no likey IT. **Answering your questions and providing guidance as necessary.** We do your tell us what you need, and we'll do our best to provide the solution.

**YOU** can also help set the agenda for the meeting by emailing any specific question before the meeting. This isn't required, but it can give us a heads up on what you need to do any research to find the answer. Of course, we'll still field any questions questions ahead of time to one of the following people:

G&S Questions – [mspeakmon@mmo.sc.gov](mailto:mspeakmon@mmo.sc.gov)

IT Questions – [rbarr@mmo.sc.gov](mailto:rbarr@mmo.sc.gov)

**The next Town Hall will be Tuesday, April 11, 2023, at 10:00 AM.** At this Town Hall we will be discussing some questions we have been getting about the STC for Furniture and providing questions.

**Click on this link** to register for the MS Teams meeting. Once you have registered, you will be able to put the event on your calendar. When you do that, the link to the meeting will be in the email. The same reason you don't get the link after registering, email Michael Speakmon and he'll send it to you. Pasting this into your web browser's address field: [https://teams.microsoft.com/registration/FND46d1a-wisPWwIX83Q-u4eaTLLpgEOB8qWCwKt6mg-T2JwfhNsqq6KrXdDNRqRWQYkQClwzvnUGEe-PLDIRAEQKqndw\\_P8pUL-HKvk6rDuX-1DK4XQ?mode=read&tenantId=eqf8d014-80d8-4f27-b0d6-c3d6c085fcd&webinarRing=gcce](https://teams.microsoft.com/registration/FND46d1a-wisPWwIX83Q-u4eaTLLpgEOB8qWCwKt6mg-T2JwfhNsqq6KrXdDNRqRWQYkQClwzvnUGEe-PLDIRAEQKqndw_P8pUL-HKvk6rDuX-1DK4XQ?mode=read&tenantId=eqf8d014-80d8-4f27-b0d6-c3d6c085fcd&webinarRing=gcce)

We look forward to seeing you on April 11, 2023!



<https://www.procurement.sc.gov/dispatches>

**Market Research and Agency Input Requests for NEW State Term Contracts (STC)**  
The Office of State Procurement (OSP) is seeking input on the following recommendations for new State Term Contracts (STC). If you have any information you can share, please contact the appropriate procurement manager. Our goal is to put contracts in place that will meet your needs, but we need your input to ensure success.

**ServiceNow** - We anticipate publishing this solicitation in April 2023 with an anticipated award date of July 2023. If you have any questions or concerns, please contact Randy Barr, Sr., at [rbarr@mmo.sc.gov](mailto:rbarr@mmo.sc.gov). If you are a current user of Service Now, we would love to hear from you ASAP to ensure the new state term contract will effectively meet your needs.

**Sophos** - We anticipate publishing this solicitation in May 2023 with an anticipated award date of May 2023. If you have any questions or concerns, please contact Alicia Pearson, at [apearson@mmo.sc.gov](mailto:apearson@mmo.sc.gov). If you are a current user of Sophos, we would love to hear from you to ensure the new state term contract will effectively meet your needs.

**Market Research and Agency Input Requests for existing State Term Contracts**

**IT Equipment Leasing** - We anticipate publishing this solicitation by June with an anticipated award date of December 2023. If you have any questions or concerns, please contact Stephen Taylor, at [staylor@mmo.sc.gov](mailto:staylor@mmo.sc.gov). If you are a current user of Presidio and the IT Equipment Leasing contract, we would love to hear from you to ensure the new state term contract will effectively meet your needs.

**IT Temporary Staff Augmentation Supplier Contracts** - We anticipate publishing this solicitation in the next week or so with an anticipated award date of early to mid-June 2023. Due to expected high volume of received bids, the award date could be extended to a further date. If you have any questions or concerns, please contact Stephen Taylor ([staylor@mmo.sc.gov](mailto:staylor@mmo.sc.gov)).

**Cyber Liability Insurance (Expires 12/16/2023)** - Michael Speakmon ([mspeakmon@mmo.sc.gov](mailto:mspeakmon@mmo.sc.gov)) is conducting research into the next iteration of this contract and is looking for any input that you may have.



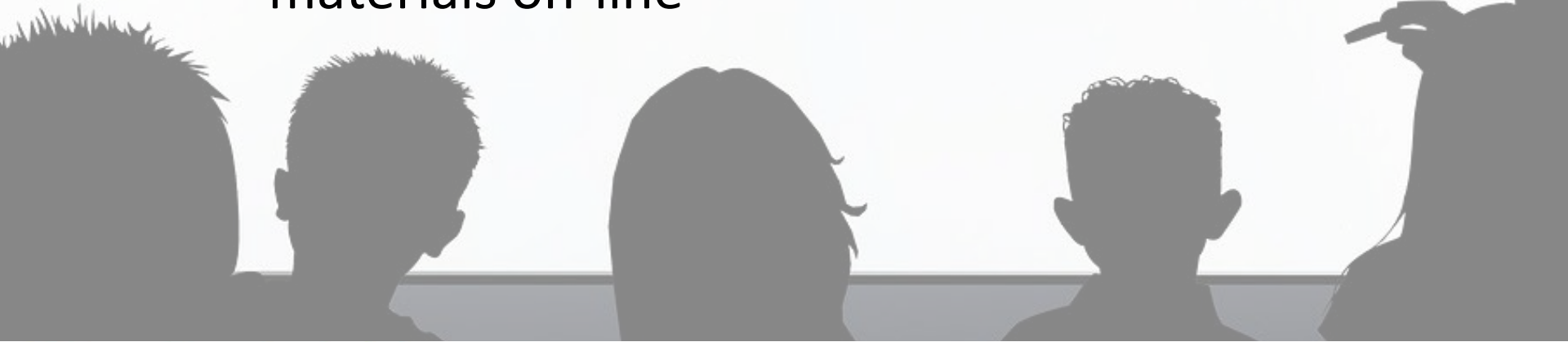
# STC Town Hall Meetings



## Next meeting in December

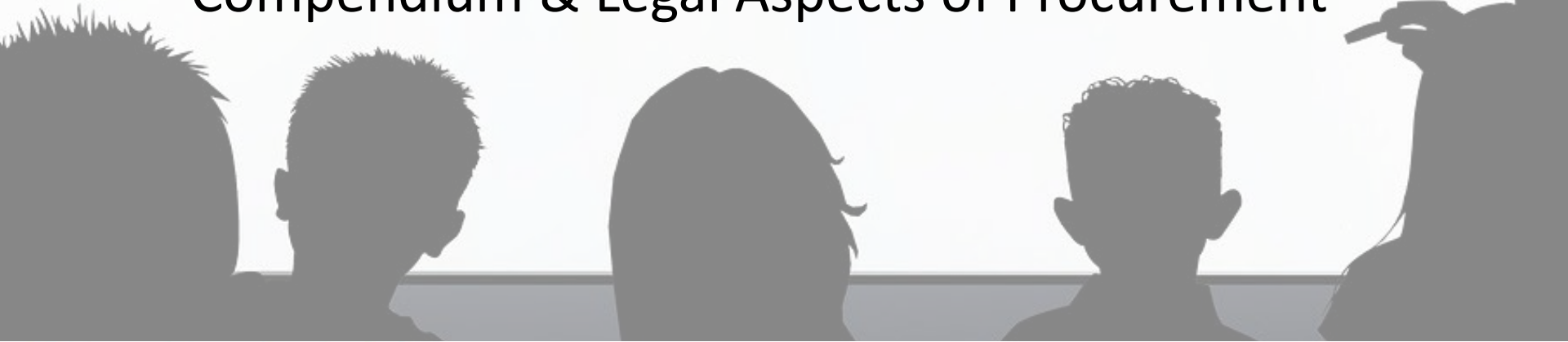
# Training Updates

- Hosting more courses and now offering free “Lunch & Learn” type Webinars
- New Learning Management System (LMS)
  - Allows us to move some courses and materials on-line



# Courses Coming Soon

- NEW - Invitation for Bids course
- NEW - Acquisition Planning & Market Research
- Introduction to the Code
- Contract Administration
- Request for Proposals
- Compendium & Legal Aspects of Procurement





# Model School District Code Highlights





It starts with  
knowing who is  
responsible for  
each step along  
the way.

Who is on first?

Abbott & Costello

# Chief Business Official – CBO

## Definition

A District employee, above the level of procurement officer and reporting directly to the superintendent, designated in writing by the Superintendent as having primary management responsibility for District business operations or finance.

Unless otherwise provided by the Superintendent, the CBO shall also serve as the "Chief Procurement Officer (CPO)."

The name and official District title of the person currently serving as the District's CBO must be published in the internal procurement procedures issued pursuant to Section 540.



# Chief Procurement Officer – CPO

## Definition

A District employee, above the level of procurement officer, designated in writing by the Superintendent as having primary management responsibility for supervising procurement or disposal by the District.

The Superintendent may provide for the division or sharing of duties and powers assigned by this code to the chief procurement officer to more than one person.

The name and official District title of the person currently serving as the District's CPO must be published in the internal procurement procedures issued pursuant to Section 540.

# Approval of Procurement Procedures

## Section 540 (2)

The District shall develop internal procurement procedures consistent with this code and the procurement regulations; except, that the procurement procedures must be approved in writing by the Superintendent.

DPS website has **Procurement Manual Checklist**

# Internal Controls

Audits start with a review of the agency's most recent **internal procurement operating procedures manual**.

Are controls documented?

Are they effective; i.e., do they reduce risk to an acceptable level?



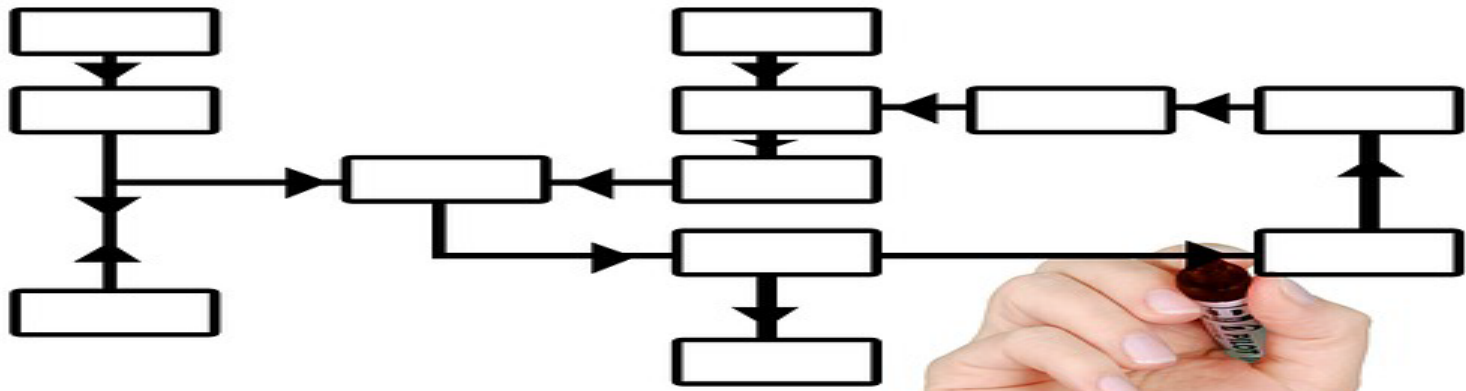
# Agency Procurement Procedures Manual

- Use procurement manual checklist to ensure all procurement activities are covered
- Document agency's system of internal controls
- Are effective dates shown? Are revisions dated?
- How are files indexed?
- Record Retention policy? Who will purge?

**Develop a standard file index system and storage location and put it in your manual.**

# Procurement Manuals

- Provide step-by-step procedures; if automated, include screenshots
- Arrange in the same order as the process
- Assign accountability to positions
- Cross-reference the Code and Regulation
- Reference or link to agency approved forms
- Who has approval authority in specific areas?  
And is the approval digital?



# System Controls

- Some controls are contained in the ERP or other software.
- These controls may take the form of limits in amount, workflow to supervisors for approvals, automatic date capture, authority to print.
- These should be documented in the procedure manual; otherwise, there may appear to be a weakness in the system of internal controls.

# Procurement Manuals

- Where do purchase requisitions originate?
- Are they on paper, electronic document, or in SRM/ERP system?
- What about IT requisitions greater than \$50k?
- Who creates the PO?
- Who sends the PO to the vendor?
- Who creates the goods receipt?
- What happens to incomplete orders?
- Who receives and approves an invoice?
- Where?



# Compliance

Risk assessment - understand how your procedures reduce the risk (inherent risk) to an acceptable level (residual risk).

Audit procedures - make sure that agency procurement procedures are sufficient and are working as planned.

**Process improvement – when something goes wrong, what caused it? Do procedures need to be changed or clarified? How often?**

# Poll Question

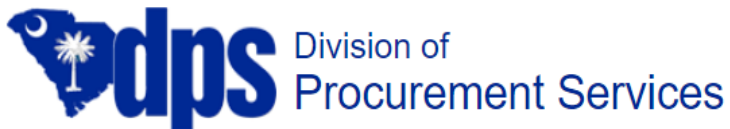
Who likes FREE things?



# Public Notice

## Model Comment: Section 10 (4)

This code adopts South Carolina Business Opportunities (SCBO) as the standard method of providing public notice regarding contract opportunities; use of SCBO is mandatory.



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Home > South Carolina Business Opportunities > SCBO Online Edition

## South Carolina Business Opportunities

### SCBO Online Edition

Welcome to the SCBO Online Edition

# Public Notice – Sole Source

## Advertising Requirements - Intent to Award without Competition

- ▶ Less than or equal to \$50,000 - Advertising is not required
- ▶ Greater than \$50,000 but less than or equal to \$250,000 - Advertise in SCBO for 5 business days
- ▶ Greater than \$250,000 - Advertise in SCBO for 10 business days



NOTICE



# Public Notice – Sole Source

## Advertising Requirements

- Must include the determination OR how to obtain the determination *immediately* upon request
- Must include a statement of right to protest





# Sole Source Procurement FAQs



SCBO Ad size is limited. What if I have too much information to fit in the ad?



Information can be referenced using a link to a more detailed document within the SCBO Ad.

# Emergency Contracts

## 11-35-1570



Immediate threat to:

- public health
- welfare
- critical economy & efficiency
- or safety

under emergency conditions

# Emergency Contracts

## 11-35-1570



Total potential value of \$50K  
or more **must** be posted in  
**SCBO as soon as practicable**  
**thereafter**



Notice must contain  
a statement of right  
to **protest**





# Emergency Procurement FAQs



When advertising in SCBO, what information is appropriate for the Bid Opening Time & Date field?



Use the End Date of the Protest Period in the SCBO Ad.

# Competition Thresholds

Another Internal Control - Based on risk

- \$0 - \$10,000 - Fair and Reasonable
- \$10,000.01 - \$25,000 – 3 Bona Fide Written quotes
- \$25,000.01 - \$50,000 - Written solicitation of written quotes, advertised in SCBO
- Greater than \$50,000 - Formal sealed bidding, i.e. IFB, RFP, BVB, FPB, Reverse Auction – Must be advertised in SCBO





# Small Purchases

## 11-35-1550

### SMALL PURCHASE PROCEDURES

COMPETITION AND NOTICE REQUIREMENTS						
X = Total Potential Value of Procurement	SCBO Advertisement Required?			Bona Fide Written Quotes Required?		
	COTS	Construction	Everything Else	COTS	Construction*	Everything Else
$X \leq \$10,000^5$	No	No	No	No	No	No
$\$10,000 < X \leq \$25,000$	No	No	No	Yes – 3 or more**	Yes – 3 or more**	Yes – 3 or more**
$\$25,000 < X \leq \$50,000$	No	No	Yes	Yes – 3 or more**	Yes – 3 or more**	Yes – 1 or more
$\$50,000 < X \leq \$100,000$	No	No	Yes	Yes – 3 or more**	Yes – 3 or more**	Yes – 1 or more

\*\* If published in SCBO, only one bona fide written quote from a responsible bidder is needed.

<https://www.procurement.sc.gov/osp/policy>

# Small Purchases

11-35-1550



AWARD AND PROTESTS						
X = Total Potential Value of Procurement	Notice of Award Required?‡			Protestable?		
	COTS	Construction	Everything Else	COTS	Construction	Everything Else
$X \leq \$10,000$	No	No	No	No	No	No
$\$10,000 < X \leq \$25,000$	No	No	No	No	No	No
$\$25,000 < X \leq \$50,000$	No	No	No	No	No	No
$\$50,000 < X \leq \$100,000$	Yes	Yes	Yes	Yes**	Yes**	Yes**

## Notes

§ “The purchasing office must annotate the purchase requisition: ‘Price is fair and reasonable’ and sign.” S.C. Code Ann. § 11-35-1550(2)(a).

\* Procuring agency does not have to but may require bidders to provide bid bonds for projects of \$100,000 or less. Procuring agency must require performance and payment bonds on projects greater than \$50,000.

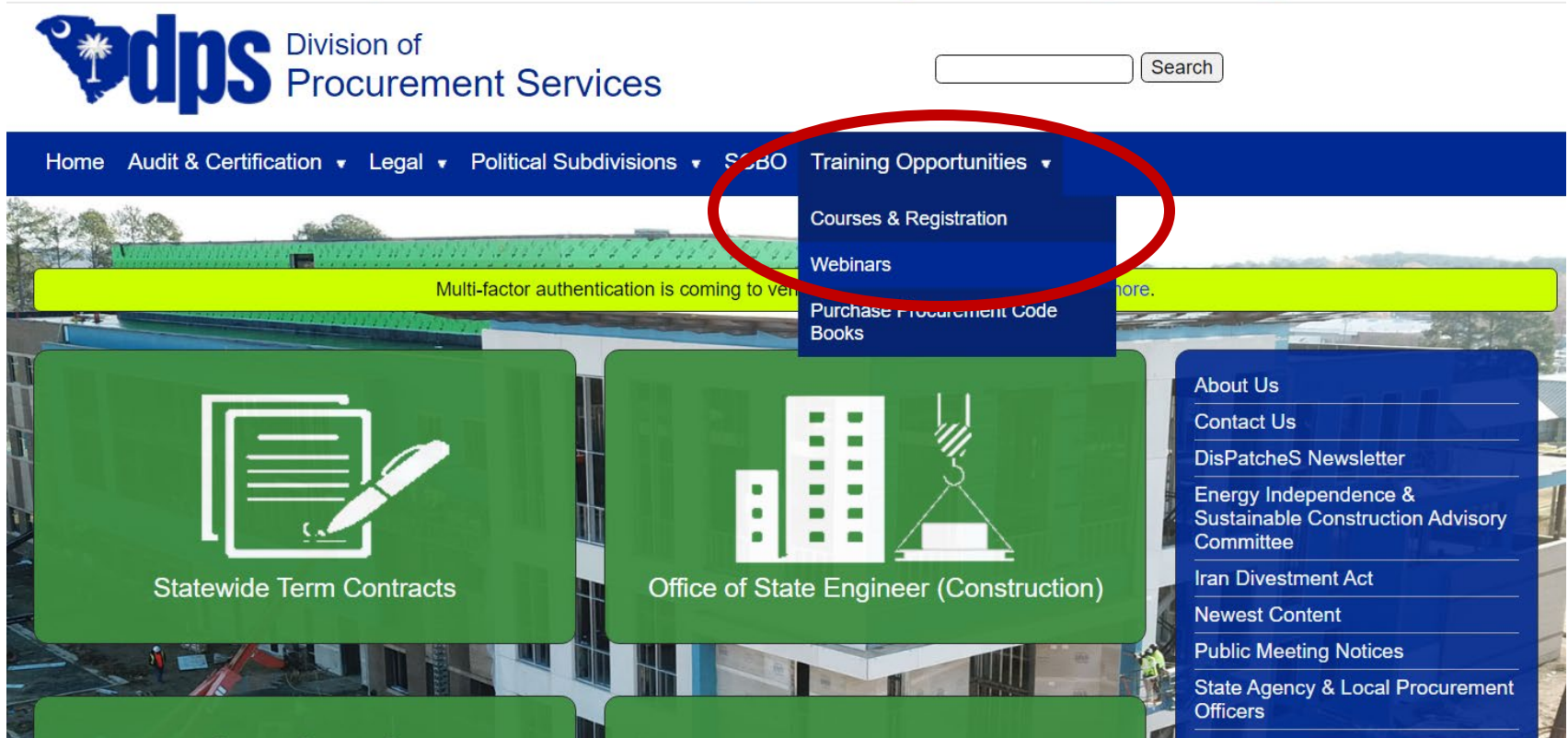
\*\* If published in SCBO, only one bona fide written quote from a responsible bidder is needed.

‡ When required, notice of an award must be communicated to all bidders on the same date award is made. Any method of communication may be used (Reg. 19-445.2100A(6)).

\*\* Contract formation is not delayed after notice of award. Purchasing agency does not have to wait for the protest period to expire before allowing the awarded vendor to start performance.



# Learn more at your convenience:



# Webinars

## FOIA

**Date:** November 03, 2023

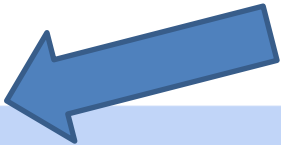
This is the recording for the FOIA presentation that was given by Kimber Craig on October 27, 2023.

[view webinar](#)

### Additional Items:

- [FOIA Slides](#)
- [FOIA Transcript](#)

## Sole Source and Public Notice webinar



**Date:** September 29, 2023

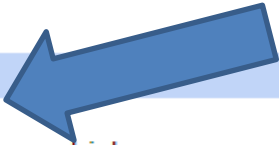
This is a recording of the Sole Source and Public Notice webinar that was presented by Kimber Craig on September 29, 2023.

[view webinar](#)

### Additional Items:

- [Sole Source and Public Notice Slides](#)
- [Sole Source and Public Notice Transcript](#)

## COTS Webinar August 11, 2023



**Date:** August 18, 2023

This is the recording of the COTS webinar which was presented by Kimber Craig on August 11, 2023.

[view webinar](#)

### Additional Items:

- [August 11, 2023 COTS Webinar Slides](#)
- [COTS Webinar Transcript](#)

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## THE DIVISION OF PROCUREMENT SERVICES



# Any Questions?

