



CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS ADMINISTRATIVE POLICY MANUAL

Finance & Administration

Approved By: Richard R. Rush
President

Policy Number: FA.60.002

Effective Date: 10/28/08

Page 1 of 3

Policy on Procurement

PURPOSE:

CSUCI Procurement and Contract Services (“Procurement”) carries out purchasing, contracting, and certain support services functions for the campus. Procurement is responsible for ensuring that acquisitions of all goods and services are made within the framework of the CSU Policy Manual for Contracting & Procurement as well as the statutes and regulations of the State of California, the State University Administrative Manual (SUAM) and any other applicable policies issued by the State, the CSU Trustees, and the University President.

BACKGROUND:

Procurement assists faculty and staff in acquiring commodities and services of a specified quality, delivered at the desired time, in the proper amount, at an economical price and from an acceptable source. A major objective is to promote fair, ethical and legal practices in carrying out these transactions for the university.

Procurement subscribes to fundamental principles encompassed in CSU Trustees’ Policy, which are:

- Recognition that the basic mission of the CSU is to support the teaching, research and public service requirements for higher education for the people of the State of California,
- Recognition that the continued development and refinement of procurement policies in accordance with good business judgment and best business practices is important to the effective and efficient total operations of CSUCI,
- Belief that it is in CSUCI’s best interest to limit, as much as possible, prescriptive policies and regulations and to provide maximum flexibility to, and accountability for, the adoption of local campus policies and procedures to insure the cost effective operation of campus business, and,
- Recognition that the CSU Policy Manual establishes a baseline for State Law and Trustees’ Policy and that it is the responsibility of the campus to determine the disposition of any issue not specifically addressed in the CSU Policy Manual or prescribed in State laws or regulations.



CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS ADMINISTRATIVE POLICY MANUAL

Finance & Administration

Approved By: Richard R. Rush
President

Policy Number: FA.60.002

Effective Date: 10/28/08

Page 2 of 3

Policy on Procurement

POLICY:

Accountability:

President's Authority: The President of each CSU campus has received delegated authority from the Chancellor to purchase, sell, lease, or license personal property and acquire or provide services in accordance with Trustees' policy and law. Responsibility for the preparation of internal policies and procedures consistent with CSU Policy and California law remains with the President. This delegated authority is subject to the condition that certain of these transactions be submitted to the Office of the Chancellor for review and approval. These transactions are:

- a. Any transaction that exceeds \$100,000 and is awarded without the taking of competitive bids (sole source). This condition does not apply, however, to sole brand acquisitions that are acquired under competitive procedures nor to contracts pursuant to a planned purchasing program or master agreement previously reviewed and approved by the Office of the Chancellor;
- b. Transactions that contain system-wide or multi-campus obligations, liabilities or encumbrances (requests for delegation shall be considered);
- c. Transactions that contain provisions for the tax-exempt financing of equipment or services;
- d. Contracts to obtain legal services to be performed by outside (non-CSU) counsel.

Transactions or requests related to the preceding conditions must be submitted with all related documentation and an explanation of the transaction to the Office of the Chancellor, in order to coordinate program & legal reviews.

Applicability:

This policy is applicable to all procurement, purchasing and contracting activities that take place in the course of doing business at California State University Channel Islands.

Text:

CSUCI Procurement and Contract Services shall procure all necessary and appropriate goods and services for the University at the best possible price, other than those further delegated to purchasers authorized below. Procurement thereby maximizes the use of University resources within the framework of requirements of Federal and State law and the mandates of the CSU system, as well as protects the University's assets by minimizing risks in contracting and procurement.



CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS ADMINISTRATIVE POLICY MANUAL

Finance & Administration

Approved By: Richard R. Rush
President

Policy Number: FA.60.002

Effective Date: 10/28/08

Page 3 of 3

Policy on Procurement

Delegated Campus Authority: Authority has been delegated to campus departments to acquire certain kinds of commodities and services described as direct payment acquisitions. These typically are transactions for which little or no value can be added by processing them through the standard procurement procedures. They would routinely be requested by a check request form and include commitments or obligations for such things as advertisements, postage & mailing charges, petty cash fund reimbursements, stipends, fees for guest artists or lecturers (honoraria), accreditation fees, travel, relocation or other personal reimbursements, books, subscriptions, publications, registration fees, insurance premiums and utilities.

An additional delegated purchasing authority known as the Procurement Card Program allows participating campus faculty and staff to expend department funds directly for certain commodities. Budget, Procurement & Support Services administers this program. Low dollar value purchases are made via the issuance of procurement credit cards to campus faculty and staff that apply and qualify for participation in the program. The primary purpose of this program is to reduce processing time, cost, and delivery delays. It is intended also to enhance user productivity and satisfaction as well as to promote user independence. Acquisition of services under this delegation program is not permitted.

EXHIBIT(S):

Chancellor's Executive Orders 615, 667, 669; CSU Policy 102, California Public Contract Code, the California State University Policy Manual for Contracts and Procurement (<http://www.calstate.edu/CSP/erl/policy/Policy.shtml>), CSUCI Procurement Operations Manual and the CSUCI Procurement Card Handbook (http://www.csuci.edu/budget/documents/Procurement_Card_Handbook.pdf).