**City and County of San Francisco Purchasing and Contracting Training**

**Overview:**

Beginning January 2020, the Office of Contract Administration will begin holding Purchasing and Contracting Training for all interested City staff. This three-hour training will provide City staff with a better understanding of the City’s purchasing and contracting principles and provide transaction-specific guidelines and instructions.

**Who should attend:**

This training is recommended for any staff involved in the purchasing and contracting cycle, from project managers, to purchasers, accountants and clerical staff. Employees engaged in purchasing technology are particularly encouraged to attend this training.

**Training Agenda:**

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| **Topic** | **Description** | **Duration** | **Resources** |
| **Introduction to City Procurement** | * Overview of the **City’s procurement regulations, terminology, and general concepts**. * Commodities *v.* General Services *v.* Professional Services. | 30  Minutes |  |
| **Non IT Commodities and General Services under $10K:**  One Time Purchases  ***Prop Q Delegated Purchasing Authority*** | * Overview of **Prop Q Delegated Purchasing Authority** process for one time purchases under $10K for Commodities and General Services. | 10  Minutes |  |
| **Non IT Commodities and General Services over $10K:**  One-Time Purchases  ***Req to Sourcing Event to PO***  ***Req to PO (No Bid)*** | * Comparing one-time purchases resulting in single POs to recurring purchases resulting in Term Contracts. * Overview of **Requisitions to PO process**. * Non IT Requisition steps, approval process and checklists. | 20 Minutes |  |
| **Direct Contracting for:**   * Recurring Non IT Purchases; * Professional Services; * Technology Purchases | * In depth review of **OCA’s checklists for multi-year direct contracts** for on-going purchases of any type, Professional Services, and/or Technology Purchases. * How to **submit contracts for OCA review** through [Service Now](http://ccsfdt.service-now.com/). * **City Contracting Templates**: * Public Facing: <https://sfgov.org/oca/multi-year-direct-contracting-checklists-templates> * City staff only: [Click here](https://sfgov1.sharepoint.com/:f:/r/sites/ADM-OCAWaiver/Shared%20Documents/OCA%20Contract%20Templates?csf=1&web=1&e=iQrH3c) | 30 Minutes |  |
| **Overview of the City’s Technology Purchasing Guidelines** | * What to consider when making a Technology purchase. * Chapter 19B **Surveillance Technology Ordinance** * City policy on **cloud computing.** * Different **options for purchasing Technology:** * Direct Contracting * Technology Marketplace * Enterprise Agreements. | 20 Minutes |  |
| **Using the City’s Tech Marketplace Resellers for Technology Purchases** | * **Technology Marketplace IT requisition checklists** for purchase requests made using the Technology Marketplace process in lieu of Direct Contracting. * **Sample Technology Marketplace RFPs** | 20 Minutes |  |
| **Waiving OCA’s Solicitation Requirements** | * How to **use** [**Service Now Website**](http://ccsfdt.service-now.com/) **to Request a Waiver** of OCA’s Solicitation Requirements. * Review of the various basis for asking OCA to waive or modify its solicitation requirements. | 20 Minutes |  |
| **Guidelines for Purchasing Training and Gift Cards** | * **Customized v. Non Customized Training** * Online training considerations * How to purchase Gift Cards | 20 Minutes |  |