

## Training Services Matrix (1/30/20)

### Customized Training

Definition:  
Specifically developed for the requesting department.

- **Solicitation Requirements:**
  - **≤ \$10,000:** None (but highly encouraged) except if required by grant or other funding source.
  - **> \$10,000 and < \$129,000:** Informal RFP to a minimum of three bidders, in accordance with Chapter 21, unless solicitation requirements are waived by OCA.
  - **≥ \$129,000:** Formal public RFP, in accordance with Chapter 21, unless solicitation requirements are waived by OCA.
- **Contract Form:** P-600. *If the purchase involves online training, you may be required to use the P-648 (SaaS Template), P-629 (Online Content Template) or other City software agreement template.*
- **Supplier Compliance:** Suppliers will still be required to comply with 12B, 12X and all other applicable City supplier requirements.
- **Insurance:** Standard insurance requirements as per P-600, unless otherwise provided by the Risk Manager.
- **PeopleSoft Purchasing Authority:**

≤ \$10K	"PROFSERV-10K"
> \$10,000 and < \$129K	"PROFSERV-BID"
≥ \$1290K	"PROFSERV-BID"
Waived	"PROFSERV-NOS"

### Non-Customized / Off the Shelf Training

Definition:  
Standard training offered in the same manner to anyone purchasing it (e.g. the curriculum and/or course materials are not altered in any way).

- **Solicitation Requirements:**
  - **≤ \$10,000:** None (but highly encouraged) except if required by grant or other funding source.
  - **> \$10,000 and < \$706,000:** If possible, request quotes from a minimum of three bidders.
  - **≥ \$706,000:** Unless waived by OCA, a formal solicitation will be required in accordance with Chapter 21. Submit request to OCA to conduct solicitation on your behalf.
- **Contract Form:** Purchase Order.  
\* *If the purchase involves online training, consult with your City Attorney to determine if a PO without a duly negotiated software license agreement will suffice. If a contract is required, you will be required to follow OCA's standard contracting requirements. Alternatively, you may make the purchase through the City's Technology Marketplace process.*
- **Supplier Compliance:** Suppliers will still be required to comply with 12B, 12X and all other applicable City supplier requirements.
- **Insurance:**
  - **On-Site:** Consult with Risk Manager regarding the City's standard insurance requirements (GL, Auto and WC) and incorporate into the PO in the "Edit Comments" or "Ship To Comments" field(s).
  - **Off-Site:** Generally not required. If uncertain, Consult with Risk Manager.
- **PeopleSoft Purchasing Authority:**

≤ \$10K	"NON-PURCHASING"
> \$10,000 and < \$706K	"NON-PURCHASING"
≥ \$706K	"NON-PURCHASING"
Waived	"NON-PURCHASING"

