

**Central States Air Resource Agencies Association  
(CenSARA)**

**PROCUREMENT MANUAL**

**OVERVIEW:** Procurement covers the acquisition of goods, services and works from third parties. In procuring goods, services or works, all employees are responsible and accountable for achieving value for money. Value for money is best achieved by competition unless there are compelling reasons to the contrary. Competition promotes economy, efficiency and effectiveness in public expenditure and contributes to the competitiveness of suppliers. CenSARA is committed to good governance, transparency and fairness in the procurement process and beyond.

**CenSARA pursues opportunities to establish procurement agreements with Minority- and/or Women-Owned businesses while achieving value for money.**

**MANAGEMENT APPROVAL REQUIRED TO ACCEPT AND CHANGE THIS POLICY: CenSARA MEMBERSHIP**

# PROCUREMENT MANUAL

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**HISTORICAL NOTES**

<b>1: PROCUREMENT PRINCIPLES AND STANDARDS</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED:</b>

**PROCUREMENT PRINCIPLES AND STANDARDS**

The CenSARA procurement principles provide leadership and services for innovative, responsive, and accountable procurement of necessary supplies and services, striving to optimize taxpayer dollars while carefully monitoring and improving the use of our time, talent and resources.

Procurement requirements are written in a clear manner to promote understanding of standards for use by CenSARA staff for the procurement of supplies and other expendable property, equipment, real property and other services with Federal and non-federal funds.

Standards are furnished to ensure that such materials and services are obtained in an effective manner and in compliance with the provisions of applicable Federal statutes and Executive Orders.

## 2: PROCUREMENT DEFINITIONS

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED:**

### DEFINITIONS

***Accrued expenditures*** mean the charges incurred by CenSARA during a given period requiring the provision of funds for:

- (1) Goods and other tangible property received;
- (2) Services performed by employees, contractors, sub recipients, and other payees; and
- (3) Other amounts becoming owed under programs for which no current services or performance is required.

***Accrued income*** means the sum of:

- (1) Earnings during a given period from;
  - (i) Training performed or contracted for performance by CenSARA; and
  - (ii) Goods and other tangible property donated to CenSARA.

***Acquisition cost of equipment*** means the net invoice price of the equipment, including the cost of modifications, attachments, accessories, or auxiliary apparatus necessary to make the property usable for the purpose for which it was acquired. Other charges, such as the cost of installation, transportation, taxes, duty or protective in-transit insurance, shall be included in the unit acquisition cost.

***Award*** means financial assistance that provides support or stimulation to accomplish a public purpose. Awards include sub awards and other agreements to an eligible recipient.

***Closeout*** means the process by which CenSARA completes all applicable administrative actions and all required work of the award and submits those documents to the Federal awarding agency.

**Contract** means a procurement document developed under a Request for Proposal or a Contract Schedule.

**Cost sharing or matching** means that portion of project or program costs not borne by the Federal Government.

**Date of completion** means the date on which all work under a contract, sub award, or Award of Work is completed.

**Disallowed costs** means those charges to CenSARA determined to be unallowable, in accordance with the applicable Federal cost principles or other terms and conditions contained in the contract, sub award, or Award of Work.

**Equipment** means tangible nonexpendable personal property having a useful life of more than one year and an acquisition cost of \$5000 or more per unit.

**Excess property** means property purchased with monies from any Federal awarding agency that, as determined by CenSARA, is no longer required for its needs or the discharge of its responsibilities.

**Federal awarding agency** means the Federal agency that provides an award to CenSARA.

**Federal funds authorized** means the total amount of Federal funds obligated by the Federal Government for use by CenSARA. This amount may include any authorized carryover of unobligated funds from prior funding periods when permitted by federal agency regulations or federal agency implementing instructions.

**Funding period** means the period of time when Federal funding is available for obligation by the recipient.

**Obligations** means the amounts of contracts and sub awards awarded, services received and similar transactions during a given period that require payment by CenSARA the recipient during the same or a future period.

**Outlays or expenditures** means charges made to a project or program. They may be reported on a cash or accrual basis. For reports prepared on a cash basis, outlays are the sum of cash disbursements for direct charges for goods and services, the amount of indirect expense charged, the value of third party in-kind contributions applied and the amount of cash advances and payments made to sub recipients. For reports prepared on an accrual basis, outlays are the sum of cash disbursements for direct charges for goods and services, the amount of indirect expense incurred, the value of in-kind contributions applied, and the net increase (or decrease) in the amounts owed by the recipient for goods and other property received, for services performed by employees, contractors, sub recipients and other payees and other amounts becoming owed under programs for which no current services or performance are required.

**Prior approval** means written approval by an authorized official evidencing prior consent.

**Program income** means gross income earned by CenSARA that is directly generated by a supported activity or earned as a result of the award (see exclusions in §30.24 (e) and (h)). Program income includes, but is not limited to, income from fees for services performed, registration fees, the use or rental of real or personal property acquired under federally-funded projects, the sale of commodities or items fabricated under an award, license fees and royalties on patents and copyrights, and interest on loans made with award funds. Interest earned on advances of Federal funds is not program income. Except as otherwise provided in Federal awarding agency regulations or the terms and conditions of the award, program income does not include the receipt of principal on loans, rebates, credits, discounts, etc., or interest earned on any of them.

**Project costs** means all allowable costs, as set forth in the applicable Federal cost principles, incurred by CenSARA and the value of the contributions made by third parties in accomplishing the objectives of the award during the project period.

**Project period** means the period established in the award document during which Federal sponsorship begins and ends.

**Property** means, unless otherwise stated, real property, equipment, intangible property and debt instruments.

**Real property** means land, including land improvements, structures and appurtenances thereto, but excludes movable machinery and equipment.

**Small award** means a grant or cooperative agreement not exceeding the small purchase threshold fixed at 41 U.S.C. 403(11) (currently \$100,000).

**Sub award means** an award of financial assistance in the form of money made under an award by CenSARA to an eligible sub recipient or by a sub recipient to a lower tier sub recipient. The term includes financial assistance when provided by any legal agreement, even if the agreement is called a contract, but does not include procurement of goods and services nor does it include any form of assistance which is excluded from the definition of “award” previously defined.

**Sub recipient** means the legal entity to which a sub award is made and which is accountable to CenSARA for the use of the funds provided.

**Supplies** means all personal property excluding equipment, intangible property, and debt instruments as defined in this section, and inventions of a contractor conceived or first actually reduced to practice in the performance of work under a funding agreement (“subject inventions”), as defined in 37 CFR part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts, and Cooperative Agreements.”

**Third party in-kind contributions** means the value of non-cash contributions provided by non-Federal third parties. Third party in-kind contributions may be in the form of real property,

equipment, supplies and other expendable property, and the value of goods and services directly benefiting and specifically identifiable to the project or program.

***Working capital advance*** means a procedure whereby funds are advanced to the sub recipient to cover its estimated disbursement needs for a given initial period.



### 3: PROCUREMENT CODE OF CONDUCT

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

### PROCUREMENT CODE OF CONDUCT

No employee, officer, or agent of CenSARA shall participate in the selection, award, or administration of a contract supported by Federal funds if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award. The officers, employees, and agents of CenSARA shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, or parties to sub agreements.

Forty-dollar, or less, is the *de minimus amount* for a supplied meal or an unsolicited item. Violations of the procurement code of conduct will result in probation, suspension, or termination, depending upon the severity of the offense as follows:

<b>Offense</b>	<b>Disciplinary Action</b>
Employees' acceptance of anything having value of \$41 dollars or more from a vendor doing business or having the potential of doing business with CenSARA.	Employee is placed on 6-month's probation and suspended for 3 days without pay.
Employee withholds information about a potential conflict of interest, later discovered.	Employee is placed on 6-month's probation and suspended for 3 days without pay.
Second offense of employees' acceptance of anything having value of \$41 dollars or more from a vendor doing business or having the potential of doing business with CenSARA.	Termination.
Employee aids vendor to secure work with CenSARA.	Termination.
Employee provides false information and witness that either discredits or favors a vendor.	Termination.

<b>4: COMPETITION</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED:</b>

**COMPETITION**

All procurement transactions shall be conducted in a manner to provide, to the maximum extent practical, open and free competition. CenSARA remains vigilant to discovery of organizational conflicts of interest as well as noncompetitive practices among contractors that may restrict or eliminate competition or otherwise restrain trade.

In order to ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, invitations for bids, and/or requests for proposals that would provide the opportunity for an advantage in submitting bids shall be excluded from competing for such procurements. Awards shall be made to the bidder or offeror<sup>1</sup> whose bid or offer is responsive to the solicitation and is most advantageous to the recipient, given price, quality, and other factors considered.

Solicitations shall clearly set forth all requirements that the bidder or offeror shall fulfill in order for the bid or offer to be evaluated by CenSARA. Any and all bids or offers may be rejected when it is in CenSARA's interest to do so.

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<sup>1</sup> A person or entity that makes a specific proposal to CenSARA to enter into a contract.

## 5: PROCUREMENT PROCEDURES FOR OFFICE SUPPLIES

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

### PROCUREMENT PROCEDURES FOR OFFICE SUPPLIES

CenSARA avoids purchasing unnecessary items, including office supplies. Annually, (usually in September), a price analysis is performed on the most frequently purchased office supplies in the previous 11 months.

Several items are purchased regularly and must always be included on annual pricing requests. Examples of those items are: Copy paper, and print/copy cartridges and/or toners (printers and fax machine). Additional items for cost analysis will be selected using at least one purchase order from each of the previous 11 months (if purchases were made in that month) and examining those purchase orders for most frequently acquired items (purchased 6 or more times in the course of 11 months).

A format for price comparison may look like the following table.

Office Supply Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Copier Paper			
Paper Towels			
Desk Calendars			
Wall Calendars			
Planning Calendars			
Color Ink Cartridges/Toners			
Black Ink Cartridges/Toners			
Fax Ink Cartridges			
Frequently Purchased Item #1			
Frequently Purchased Item #2			
Frequently Purchased Item #3			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Other considerations in determining a successful bidder may include the amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, etc.

Routine purchases of office supplies will occur with the successful vendor during the period of October 1<sup>st</sup> of one year through September 30th of the following year. Discounted merchandise offered for sale below the regular purchase price with the approved vendor may be purchased through other vendors provided the items are needed.

Purchases of office supplies in excess of \$100.00 in a single transaction require prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the annual cost analysis for office supplies will be kept in the CenSARA Contract Files for the effective year and the previous year. Each new fiscal year, records that are two years old will be archived.

## 6: PROCUREMENT PROCEDURES FOR JANITORIAL SERVICES

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

### PROCUREMENT PROCEDURES FOR JANITORIAL SERVICES

When the provisions of rent do not cover janitorial services, a minimum of 3 vendors will be contacted to provide quotes for those services. A list of requested services is written and provided to all vendors. It is mandatory that vendors walk through the office space to gather accurate information regarding the number of square feet and number of restrooms that require cleaning. Separate quotes are obtained for any additional services such as annual or bi-annual carpet cleaning and waxing of certain areas in the office. Other requirements may include the vendor's ability to work during regular office hours.

Bids will be received by the Office/Grant Manager or the Executive Director's designee. Office/Grant Manager will perform a price analysis of bids. A price analysis may be performed in a table similar to the following.

Office Areas	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Square Foot Cleaning			
Rest Rooms			
Annual, Bi-annual carpet cleaning (designated areas)			
Annual, Bi-annual stripping and application of floor wax (designated areas)			
Other Cleaning			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned

Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available. Services are acquired for up to a 3-year period (in conjunction with the length of the office rental agreement).

A recommendation will be made by the Office/Grant Manager (or designee) to the Executive Director. Authority is granted by the Executive Director to issue a 3-year contract for this service. Three months prior to the expiration date of this contract, bids will be let again in accordance with the procedures outlined in this Category.

Procurement Records – Procedures followed and documents prepared for the Janitorial Service bid and subsequent cost analysis will be kept in the CenSARA Contract Files for the duration of the contract and then archived.

**7: PROCUREMENT PROCEDURES FOR COMPUTER SUPPLIES WITH A VALUE OF \$4,999 OR LESS FOR A SINGLE ITEM**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR COMPUTER SUPPLIES WITH A VALUE OF \$4,999 OR LESS FOR A SINGLE ITEM**

CenSARA avoids purchasing unnecessary items, including computer supplies. Annually, (usually in September), a cost analysis is performed on the most frequently purchased computer supplies in the previous 11 months.

Several items are purchased regularly and must always be included on annual pricing requests. Those items include but are not limited to: computer software, computer laptops, computer mouse and mouse pads. Additional Items for cost analysis will be selected using at least one purchase order from each of the previous 11 months (if purchases were made in that month) and examining those purchase orders for most frequently acquired items (purchased in quantities of 5 or more in the course of previous 11 months).

A format for price analysis may look like the following table.

Computer Supply Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Computer Software			
Computer Laptops			
Computer Mouse			
Computer Mouse Pads			
Frequently Purchased Item #1			
Frequently Purchased Item #2			
Frequently Purchased Item #3			
Frequently Purchased Item #4			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Other considerations in determining a successful bidder may include discounts offered for non-profit status, amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Routine computer supplies will occur with the successful vendor during the period of October 1, of one year through September 30, of the following year. Discounted merchandise offered for sale below the regular purchase price with the approved vendor may be purchased through other vendors provided the items are needed.

Purchases of computer supplies in excess of \$100.00 in a single transaction require a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the annual cost analysis for computer supplies will be kept in the CenSARA Contract Files for the effective year and the previous year. Records that are two years old will be archived.



**8: PROCUREMENT PROCEDURES FOR COMPUTERS, SERVERS AND  
COMPUTER SUPPLIES WITH A VALUE OF \$5,000 OR MORE FOR A SINGLE  
ITEM**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR COMPUTERS, SERVERS, AND  
COMPUTER SUPPLIES WITH A VALUE OF \$5,000 OR MORE FOR A SINGLE  
ITEM**

CenSARA avoids purchasing unnecessary items, including computer, servers, and computer supplies with a value of \$5,000 or more for a single item. These items are infrequently purchased and would take on specific procurement requirements utilizing a decision tree based on total cost as follows.

<b>Cost</b>	<b>Determined Need</b>	<b>Approval Authority</b>	<b>Procurement Instrument</b>
\$5,000 - \$10,000	Written in grant narrative	Executive Director	3 Oral or Written Bids
\$5,000 - \$10,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Oral or Written Bids
\$10,001 - \$50,000	Written in grant narrative	Executive Director	3 Written Bids
\$10,001 - \$50,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Written Bids
\$50,001 - \$99,999	Written in grant narrative	Executive Director	5 Written Bids
\$50,001 - \$99,999	Emergency or other need not written in the grant.	CenSARA Membership	5 Written Bids
\$100,000 and greater	Written in grant narrative	Executive Director and Concurrence of Grant Officer	Request for Proposals
\$100,000 and greater	Emergency or other need not written in the grant.	CenSARA Membership and Concurrence of Grant Officer	Request for Proposals

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A format for price analysis may look like the following table.

Computer Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
Computer Item 1			
Computer Item 2			
Computer Item 3			
Computer Item 4			
Computer Item 5			

Other considerations in determining a successful bidder may include discounts for non-profit status, amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Procurement Records – Documents prepared for the purchase of computers, servers, and computer supplies with a value of \$5,000 or greater for individual items and the price analysis will be kept in the CenSARA Contract Files for the effective year and one year later. Records that are two years old will be archived.

**9: PROCUREMENT PROCEDURES FOR AUDIO VISUAL TRAINING EQUIPMENT WITH A VALUE OF \$5,000 OR MORE FOR A SINGLE ITEM**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED:**

**PROCUREMENT PROCEDURES FOR AUDIO VISUAL TRAINING EQUIPMENT WITH A VALUE OF \$5,000 OR MORE FOR A SINGLE ITEM**

CenSARA avoids purchasing unnecessary items, including audio visual training equipment with a value of \$5,000 or more for a single item. These items are infrequently purchased and would take on specific procurement requirements utilizing a decision tree based on total cost as follows.

<b>Cost</b>	<b>Determined Need</b>	<b>Approval Authority</b>	<b>Procurement Instrument</b>
\$5,000 - \$10,000	Written in grant narrative	Executive Director	3 Oral or Written Bids
\$5,000 - \$10,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Oral or Written Bids
\$10,001 - \$50,000	Written in grant narrative	Executive Director	3 Written Bids
\$10,001 - \$50,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Written Bids
\$50,001 - \$99,999	Written in grant narrative	Executive Director	5 Written Bids
\$50,001 - \$99,999	Emergency or other need not written in the grant.	CenSARA Membership	5 Written Bids
\$100,000 and greater	Written in grant narrative	Executive Director and Concurrence of Grant Officer	Request for Proposals and Basis of Award
\$100,000 and greater	Emergency or other need not written in the grant.	CenSARA Membership and Concurrence of Grant Officer	Request for Proposals and Basis of Award

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A format for price analysis may look like the following table.

A/V Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
A/V Item 1			
A/V Item 2			
A/V Item 3			
A/V Item 4			
A/V Item 5			

Other considerations in determining a successful bidder may include discounts for non-profit status, amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Procurement Records – Documents prepared for the purchase of A/V equipment and/or supplies with a value of \$5,000 or greater for individual items and the price analysis will be kept in the CenSARA Contract Files for the effective year and one year later. Records that are two years old will be archived.

<b>10: PROCUREMENT PROCEDURES FOR OFFICE FURNITURE, SET ASIDE – DISADVANTAGED, SMALL BUSINESS</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED: 12/7/11</b>

### **PROCUREMENT PROCEDURES FOR OFFICE FURNITURE**

CenSARA avoids purchasing unnecessary items, including office furniture. These items are infrequently purchased and when needed are purchased through the Oklahoma Department of Corrections, Prison Enterprises. This is currently a set aside program that goes towards meeting CenSARA's goal of utilizing federal grant dollars in support of Disadvantaged and Small Businesses. The Executive Director may elect to utilize another company at any time, if it is more advantageous to the organization.

Purchases of office furniture in excess of \$100.00 in a single transaction require a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the purchase of any office furniture are kept in the Accounting Files. Records that are two years old will be archived.

**11: PROCUREMENT PROCEDURES FOR INFORMATION TECHNOLOGY  
(IT) SERVICE AND MAINTENANCE**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR INFORMATION TECHNOLOGY (IT)  
SERVICE AND MAINTENANCE**

CenSARA avoids purchasing unnecessary items and services. Information technology service and maintenance is a specialized skill for which no existing or anticipated future CenSARA staff person has the necessary training and experience.

A set of service and maintenance specifications will be disseminated to a pool of potential vendors for price bidding. Bids will be received by a designated staff person having the best qualifications to review such responses. The staff person will perform a price analysis of bids. In doing so, the person may consult other CenSARA staff and/or state agency personnel who have IT expertise.

A price analysis may be performed in a table similar to the following.

IT Service/Maintenance Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Service Component 1			
Service Component 2			
Service Component 3			
Maintenance Component 1			
Maintenance Component 2			
Maintenance Component 3			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A recommendation will be made by the Designated Staff Person to the Executive Director who has the authority to issue up to a 3-year contract for this service. Three months prior to the expiration date of a contract, bids will be let again in accordance with the procedures outlined in this Category.

Procurement Records – Procedures followed and documents prepared for the Information Technology (IT) Service and Maintenance bid, price analysis, and subsequent contract will be kept in the CenSARA Contract Files for the duration of the contract and then archived.

<b>12: PROCUREMENT PROCEDURES FOR CONFERENCES, MEETINGS, AND TRAINING LOCATIONS</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED: 12/7/11</b>

**PROCUREMENT PROCEDURES FOR CONFERENCES, MEETINGS, AND TRAININGS**

CenSARA avoids purchasing unnecessary items and services. When CenSARA hosts a conference, a meeting, or training sessions, meeting space and refreshments may be acquired through contracts. CenSARA utilizes EPA's, Best Practices Guide for Conferences in planning meetings, conferences, and trainings. CenSARA employees are responsible for assuring that costs for conference activities are allowable and reasonable. Contractors are not hired to make any of the conference, meeting, and training arrangements for CenSARA.

The Executive Director must approve all procurements related to conferences and meetings that exceed a threshold of \$100.00 in a single transaction. The Training Director must approve all procurements related to trainings that exceed a threshold of \$100.00 for a single transaction. Approval may be obtained through the action of signing either purchase orders or by giving written approval, e.g. Email.

Contracts with hotels may be used to purchase meeting room space, audio visual equipment, refreshments (when outside refreshments are not allowed), hotel rooms and certain business supplies or services provided to staff in lieu of their accustomed access to office equipment or supplies. Contracts for room blocks are generally signed with hotels offering a federal government room rate. The cost of the meeting room(s) is negotiated in conjunction with number of sleeping rooms booked and refreshments purchased. Contracts will be reviewed by at least two CenSARA employees before approval, but ultimately authorization to obligate funds via contract for all conferences, meetings, and trainings can only be given by the Executive Director.

When refreshments are needed to facilitate the objectives of the conferences, meetings and trainings, a request for quote for refreshment services should be obtained from a minimum of three vendors, if possible, and ultimately selected based on whomever's bid is in the best interest of CenSARA and is most responsive to the solicitation, with price, quality, and other factors considered.



Printing of Conference, Meeting, and Training Materials will be completed in the CenSARA office as often as possible. When special printing needs require the services of an outside vendor, the Procurement Practices for Printing will be utilized.

All CenSARA sponsored conferences, meetings, or trainings are held in hotels or motels that comply with the Hotel and Motel Fire Safety Act of 1990. A list of hotels and motels that comply with the Act can be found in the monthly publication of the Federal Travel Directory issued by GSA.

### 13: PROCUREMENT PROCEDURES FOR PRINTING

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

### PROCUREMENT PROCEDURES FOR PRINTING

CenSARA avoids purchasing unnecessary services such as printing of stationery, post cards, newsletters, outreach materials, or any other document. These services are infrequently purchased.

On an annual basis (usually in September), a list of possible printing specifications will be disseminated to a pool of potential vendors for price bidding. Bids will be received by a designated staff person having the best qualifications to review such responses. That staff person will perform a price analysis of bids.

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A price analysis may be performed in a table similar to the following.

Printing Category	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Printing Service #1			
Printing Service #2			
Printing Service #3			
Printing Service #4			
Printing Service #5			

Other considerations in determining a successful bidder may include discounts offered for non-profit status, amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Routine printing services will occur with the successful vendor during the period of October 1, of one year through September 30, of the following year. Discounted printing services offered for sale below the regular purchase price with the approved vendor may be purchased through other vendors provided the printing service is needed.

Purchases of printing supplies in excess of \$100.00 in a single transaction require a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the annual cost analysis for printing services will be kept in the CenSARA Contract Files for the effective year and one year later. Records that are two years old will be archived.

**14: PROCUREMENT PROCEDURES FOR AIR QUALITY MONITORING EQUIPMENT OR AIR QUALITY RESEARCH EQUIPMENT**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED:**

**PROCUREMENT PROCEDURES FOR AIR QUALITY MONITORING EQUIPMENT OR AIR QUALITY RESEARCH EQUIPMENT**

CenSARA/CENRAP has infrequent need for air quality monitoring equipment. Procurement of such items would take on specific procurement requirements utilizing a decision tree based on total cost as follows.

<b>Cost</b>	<b>Determined Need</b>	<b>Approval Authority</b>	<b>Procurement Instrument</b>
\$5,000 - \$10,000	Written in grant narrative	Executive Director	3 Oral or Written Bids
\$5,000 - \$10,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Oral or Written Bids
\$10,001 - \$50,000	Written in grant narrative	Executive Director	3 Written Bids
\$10,001 - \$50,000	Emergency or other need not written in the grant.	CenSARA Membership	3 Written Bids
\$50,001 - \$99,999	Written in grant narrative	Executive Director	5 Written Bids
\$50,001 - \$99,999	Emergency or other need not written in the grant.	CenSARA Membership	5 Written Bids
\$100,000 and greater	Written in grant narrative	Executive Director and Concurrence of Grant Officer	Request for Proposals and Basis of Award
\$100,000 and greater	Emergency or other need not written in the grant.	CenSARA Membership and Concurrence of Grant Officer	Request for Proposals and Basis of Award

It is important to note that this type of equipment is highly specialized and may be offered by one vendor as determined by technical requirements issued by the U.S. EPA (40 CFR Part 50 Appendices Part 51.190, Part 60-as applicable- and Part 61 as applicable).

Nonetheless, CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A format for price analysis may look like the following table.

Air Quality Monitoring Equipment Components	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
Equipment Component 1			
Equipment Component 2			
Equipment Component 3			
Equipment Component 4			
Equipment Component 5			

Procurement Records – Documents prepared for the purchase of equipment will be kept in the CenSARA Contract Files for two years. Records that are two years old will be archived.

**15: PROCUREMENT PROCEDURES FOR AIR QUALITY TRAINING –  
COURSE DEVELOPMENT, COURSE UPDATING, AND COURSE  
INSTRUCTION**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR AIR QUALITY TRAINING – COURSE  
DEVELOPMENT, COURSE UPDATING, AND COURSE INSTRUCTION**

This is highly specialized work having specific scientific content development and educational requirements that may require a combination of skills. Acquisition of such services may be provided in the following three ways:

- A. Request for Proposals (RFP) – Potential vendors are identified and listed. A statement of work needed is developed and communicated to potential vendors with a deadline for proposal submission. Proposals are reviewed by a minimum of three individuals (either CenSARA staff and/or state agency staff), consensus derived on the selection of the vendor, and a contract initiated.
- B. Use of Previously Solicited Information – When a group of vendors have responded to a previous RFP and provided pricing information and that information is less than six months old, CenSARA may solicit additional vendors with specialized skills and negotiate contract rates that offer prices less than or equal to the lowest price provided in response to a previous RFP.
- C. Request for Quotes under the Multiple Award System (MAS) – CenSARA maintains valid contracts issued in three year increments to a wide variety of vendors. Vendors are pre-screened as having met certain qualifying work experience and may “bid” on specific work for a particular “Schedule.” The prices are analyzed for the highest value to the organization for the needed service at the least cost.

Authority is granted through a decision tree that follows.

<b>Cost</b>	<b>Determined Need</b>	<b>Approval Authority</b>	<b>Procurement Instrument</b>
\$5,000 - \$10,000	Written in grant narrative	Executive Director	A, B, or C above.
\$5,000 - \$10,000	Emergency or other need not written in the grant.	CenSARA Membership	A, B, or C above.
\$10,001 - \$50,000	Written in grant narrative	Executive Director	A, B, or C above.
\$10,001 - \$50,000	Emergency or other need not written in the grant.	CenSARA Membership	A, B, or C above.
\$50,001 - \$99,999	Written in grant narrative	Executive Director	A, B, or C above.
\$50,001 - \$99,999	Emergency or other need not written in the grant.	CenSARA Membership	A, B, or C above.
\$100,000 and greater	Written in grant narrative	Executive Director and Concurrence of Grant Officer	A, B, or C above.
\$100,000 and greater	Emergency or other need not written in the grant.	CenSARA Membership and Concurrence of Grant Officer	A, B, or C above.

Procurement Records – A written basis for selection is generated and presented to the Executive Director for concurrence. In the case of A and B above, a contract is entered into with the successful vendor. In the case of C above, an Award of Work will be issued. Documents prepared for this procurement action will be kept in the CenSARA Contract Files for the effective contract/award of work time and archived thereafter.

<b>16: PROCUREMENT PROCEDURES FOR SUBAWARDS</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED:</b>

**PROCUREMENT PROCEDURES FOR SUBAWARDS**

CenSARA may have funds that are distributed to other entities through the process of a sub award. Depending upon the source of funds and the purpose on which these funds may be expended, the basis of selection will vary but should follow the procedures provided below.

Once the funds are identified along with specific limitations on the use of the funds and any limiting factors on potential recipients, a request for applications (RFA) will be issued that contains that information along with a deadline for submittals.

A written process for the review of the applications will be established. Based on the review process identified, reviewers will be selected. Reviewers may not participate if there is a real or potential conflict of interest. Written documentation will provide the selection methodology, summary of deliberations, and final recommendations.

With concurrence of either the CenSARA membership, a sub award will be issued.

Procurement Records – The documentation enumerated above will be kept in the Sub award File of the successful applicant(s). This file will be kept in the CenSARA Sub award Files for the effective sub award period and archived thereafter.



<b>17: PROCUREMENT PROCEDURES FOR CONTRACTS ISSUED UNDER THE MULTIPLE AWARD SCHEDULE</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED: 12/7/11</b>

**PROCUREMENT PROCEDURES FOR CONTRACTS ISSUED UNDER THE  
MULTIPLE AWARD SCHEDULE**

CenSARA designed its Multiple Award Schedule (MAS) contracting system following the Federal Acquisition Regulation (FAR). Schedules of work have been identified that CenSARA may be interested in during any given period of time. Vendors are recruited continuously and provided a set of instructions to verify their work experience, qualifications, Dunn and Bradstreet ratings by previous clients, and financial information.

A review of that information is provided by multiple CenSARA employees to determine the completeness of information and the appropriate classification of work by Schedule to which the vendor may offer a price bid.

CenSARA will maximize the MBE/WBE potential in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A vendor registry, by Schedule, is maintained in CenSARA's office to facilitate ease of making a Request for Quotes. When the need for a service or supply item has been identified, the registry is consulted for a list of the pre-approved vendors. Those vendors are provided a scope of work to bid on and a deadline for submittals.

A review committee of at least three persons will convene conference calls or other means of communication to discuss the merits of each bid.

A format for price analysis may look like the following table.

Scope of Work Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
Scope of Work Item 1			
Scope of Work Item 2			
Scope of Work Item 3			
Scope of Work Item 4			
Scope of Work Item 5			

Other considerations in determining a successful bidder may include previous work experience, anticipated delivery of work items, credentials of personnel assigned to the project, and other described criteria. An Award of Work is issued to the successful contractor.

Procurement Records – Documents prepared for the bid, basis of selection, and any other supplemental materials will be kept in the Award of Work file of the successful vendor. Records will be maintained for the length of the actual contract for that vendor and then archived thereafter.

**18: PROCUREMENT PROCEDURES FOR CONTRACTS ISSUED UNDER A  
REQUEST FOR PROPOSALS**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR CONTRACTS ISSUED UNDER A  
REQUEST FOR PROPOSALS**

When a need arises to perform certain types of work or services, a scope of work will be written that entails the type of service or work requested, the place that the work must be completed, the details of work or services to be performed or provided and an agency contact. Known industry representatives will be contacted for their participation as well as announcing the RFP on the CenSARA website.

The Scope of Work will be released with a deadline for submittals. A review committee of at least three persons will convene conference calls or other means of communication to discuss the merits of each proposal. Reviewers may not participate if there is a real or potential conflict of interest. Written documentation will provide the selection methodology, summary of deliberations, and final recommendations.

CenSARA will maximize the MBE/WBE potential in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

A format for price analysis may look like the following table.

Scope of Work Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
Scope of Work Item 1			
Scope of Work Item 2			

Scope of Work Item	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices (Add Vendors #4 and #5 as needed)
Scope of Work Item 3			
Scope of Work Item 4			
Scope of Work Item 5			

Other considerations in determining a successful bidder may include previous work experience, anticipated delivery of work items, credentials of personnel assigned to the project, and other described criteria. A contract is issued to the successful vendor.

Procurement Records – Documents prepared for the bid, basis of selection, and any other supplemental materials will be kept in the contract file of the successful vendor. Records will be maintained for the length of the actual contract for that vendor and then archived thereafter.

**19: PROCUREMENT PROCEDURES FOR HEALTH INSURANCE, DENTAL INSURANCE, AND LIFE INSURANCE**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR HEALTH INSURANCE, DENTAL INSURANCE, AND LIFE INSURANCE**

Health Insurance, Dental Insurance, and Life Insurance are benefits provided by CenSARA to its employees. Coverage and applicable rates will be evaluated at least once, every 3 years and generally in September. A more frequent review may be conducted at any time.

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Evaluation of coverage parameters will use the information in the following table as a minimum.

<b>Health, Dental, Life policies provisions</b>	<b>Vendor #1 Provisions and Prices</b>	<b>Vendor #2 Provisions and Prices</b>	<b>Vendor #3 (MBE/WBE) Provisions and Prices</b>
Hospitalization			
Prescription Drugs			
Doctors Visits			
Specialists			
Doctors and Hospitals in the Network			
Urgent Care			
Catastrophic			

<b>Health, Dental, Life policies provisions</b>	<b>Vendor #1 Provisions and Prices</b>	<b>Vendor #2 Provisions and Prices</b>	<b>Vendor #3 (MBE/WBE) Provisions and Prices</b>
Illnesses			
Co-Payments			
Routine Dental Care			
Advanced Dental Care			
Emergency Dental Care			
Life Insurance Amount			

Positive efforts will be made by CenSARA to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise/Woman-Owned Business Enterprise (MBE/WBE) located by using national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses.

Other considerations in determining a successful vendor will be (1) a review of the vendor's financial health, including reserves, as reported by A.M. Best, Moody's Investor Service, Duff & Phelps, and/or Standard & Poor's rate. This information can be obtained by asking an insurance agency, the Oklahoma State Insurance Commission (OSIC) or by asking the vendor directly; (2) submitting a request of the Oklahoma State Insurance Commission for a written report on complaints received by the OSIC on vendors of interest; (3) seeking assurance that geographic coverage of provider network is sufficient to include all covered, and (4) obtaining other network or provider information as needed.

Procurement Records – Documents prepared for the triennial price analysis for health, dental and life insurance will be kept in the CenSARA Contract Files for three years and then archived.

**20: PROCUREMENT PROCEDURES FOR OMB A-133 AUDIT SERVICES**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR OMB A-133 AUDIT SERVICES**

Title 2 of the Code of Federal Regulations (CFR) Part 215.26 speaks to the OMB Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations. CenSARA is required to have an A-133 audit of their financial documentation for its fiscal year ending September 30.

A “Request for Proposals” will be disseminated to a pool of potential vendors for price bidding. Recruitment of those vendors will take place in the following ways: (1) advertisement in daily and/or weekly Oklahoma newspapers; (2) written contact with the Oklahoma CPA Society; (3) word of mouth to the current vendor or previous vendors.

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Bids will be received by a designated staff person having the best qualifications to review such responses. Evaluations of bids will be based on price, personnel assigned to the audits, and the agency’s previous experience in conducting A-133 Audits. The designated staff person will make a recommendation to the Executive Director. Authority is granted by the Executive Director to issue a three year contract for this service.

Three months prior to the expiration date of this contract, bids will be let again in accordance with the procedures outlined in this Category.

Procurement Records – Documents prepared for the triennial price analysis for A-133 Audits will be kept in the CenSARA Contract Files for the duration of the contract and then archived.

## **21: PROCUREMENT PROCEDURES FOR TELECOMMUNICATIONS**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

### **PROCUREMENT PROCEDURES FOR TELECOMMUNICATIONS**

"Telecommunications" refers to all services and facilities capable of transmitting, switching or receiving information in any form, by wire, radio or other means. Voice and data communications services and voice and data telecommunications equipment and services include, but are not limited to, voice processing, video conferencing, PBX (Private Branch Exchange) and key systems, ACD (Automatic Call Distribution), non-STS (State Telephone System) long distance, ISDN (Integrated Services Digital Network) and IVR (Interactive Voice Response), and LAN (Local Area Network) interconnection (WAN, i.e., Wide Area Network) services.

CenSARA will evaluate services provided by its existing vendor with other similar vendors every three years, usually in September. Competition is limited in this category by virtue of federal licensing requirements. The Executive Director will designate a staff person to contact three service providers, if available, to request contact information for the purposes of requesting written prices. It is expected that vendors will perform a site visit to look at the office system prior to making a bid.

Bids will be received by a designated staff person having the best qualifications to review such responses. Evaluations of bids will be based on price, billing practices, helpline assistance, and the vendor's previous experience in the delivery of Telecommunications services. After the deadline for submitting written bids to CenSARA, the designated staff person will make a recommendation to the Executive Director. Authority is granted by the Executive Director to either continue with the existing provider or change to a new provider.

Procurement Records – Documents prepared for the triennial price analysis for Telecommunications should be kept in the CenSARA Contract Files for three years and then archived if a new vendor is selected. If the same vendor is granted additional years of service, the new documentation will be added to the existing file and that file will remain in the CenSARA Contract Files for another three years.



**22: PROCUREMENT PROCEDURES FOR EDUCATION AND OUTREACH ITEMS**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR EDUCATION AND OUTREACH ITEMS**

CenSARA avoids purchasing unnecessary items, including education and outreach items. Education and outreach materials include, but are not limited to, decals, plaques, certificates, etc., in recognition of emission reduction projects; pens, pencils, and/or coffee mugs to encourage emission reductions; and other awards to promote a specific program or project.

Annually, (usually in September), a cost analysis is performed on the most frequently purchased or anticipated to be frequently purchased education and outreach supplies in the previous 11 months (if any).

Items are purchased regularly must always be included on annual pricing requests. Additional Items for cost analysis will be selected using at least one purchase order each of the previous 11 months (if purchases were made in that month) and examining those purchase orders for most frequently acquired items (purchased in quantities of 5 or more in the course of previous 11 months).

A format for price analysis may look like the following table.

Education and Outreach Items	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Frequently Purchased Item #1			
Frequently Purchased Item #2			
Frequently Purchased Item #3			
Frequently Purchased Item #4			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state

(Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Other considerations in determining a successful bidder may include discounts offered for non-profit status, amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Routine education and outreach supplies will occur with the successful vendor during the period of October 1, of one year through September 30, of the following year. Discounted merchandise offered for sale below the regular purchase price with the approved vendor may be purchased through other vendors provided the items are needed.

Purchases of education and outreach supplies in excess of \$100.00 in a single transaction require a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the annual cost analysis for computer supplies will be kept in the CenSARA Contract Files for the effective year and the previous year. Records that are two years old will be archived.

**23: PROCUREMENT PROCEDURES FOR PROPRIETARY SUPPLIES AND SERVICES**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

In extremely infrequent instances, CenSARA must secure supplies and services that are proprietary (one vendor). Such cases are usually forced upon the agency by its grantee such as the use of the IPM computer model used by EPA to grow Energy Generating Units (EGUs) emissions into the future. In order to verify the accuracy of information in this particular case, CenSARA can only secure the use of the software through the owner. For the records, documentation will be provided that other vendors cannot offer the proprietary service or supply and reported as such in the Sole Source Justification.

In cases where CenSARA has to contract or secure services for electricity, gas, or water to the office building, utility services are determined to be available only from a sole source as a result of a regulated or a natural monopoly and these services can be obtained without bidding.

Purchases of proprietary supplies in excess of \$100.00 in a single transaction require a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

Procurement Records – Documents prepared for the procurement of proprietary supplies and services will be kept in the CenSARA Contract Files for the effective year and the previous year. Records that are two years old will be archived.

<b>CATEGORY 24: PROCUREMENT PROCEDURES FOR OFFICE SPACE</b>	
<b>ORIGINATION DATE: 9/13/07</b>	<b>LAST UPDATED: 12/7/11</b>

**PROCUREMENT PROCEDURES FOR OFFICE SPACE**

Due to the year-by-year funding of CenSARA, a determination has been made that renting office space supports the needs of CenSARA without an undue burden of a mortgage on an office building. Procurement for space also includes storage, warehouse, laboratory, and other specific grant-related activities.

When space acquisition has been approved by the CenSARA Membership, a set of space specifications will be written with a range of the least amount of acceptable square feet using the following suggested dimensions found in the Building Owners and Managers Association (BOMA) Guidelines:

**Typical President's office or Chairman of the Board**

250 to 400 sq. ft. (4 to 5 windows in length)

**Typical Vice-President's Office**

150 to 250 sq. ft. (3 to 4 windows in length)

**Typical Executive's Office**

100 to 150 sq. ft. (2 windows in length)

**Partitioned Open Space**

Clerical Supervisor or Manager 80 to 110 sq. ft.

**Open Space**

Clerical or Secretary 60 to 110 sq. ft.

**Conference Rooms**

15 sq. ft. per person: theater style

25 to 30 sq. ft. per person: conference seating

**Mail Room**

8 to 9 ft. wide with 30" counters on either side. Length depends upon amount of usage

**Reception Area**

125 to 200 sq. ft. Receptionist and 2 - 4 people

200 to 300 sq. ft. Receptionist and 6 - 8 people

**File Room**

7 sq. ft. per file with a 3' to 4' aisle width

**Library**

Allow 12" for bookshelf width

175 to 450 sq. ft. with seating for 4 - 6

**Lunch Rooms**

15 sq. ft. per person, not including kitchen. Kitchen should be 1/3 to 1/2 of seating area

**Clerical Pool Areas**

80 to 100 sq. ft. per person

**Corridors**

20% to 30% of the total usable area

**Coat Closets**

1 lineal ft. for 4 coats 3 per person

**Water Coolers/Drinking Fountains**

1 unit per 75 employees

**Suggested Column Spacing**

28' to 30' per bay

Other considerations follow:

For filing cabinets, allow 7 square feet per cabinet. In a library, account for people as well as the media shelving.

Plan accordingly for telecommuters and other "transient" workers. Set up non-assigned workstations that they can use when they come in. In most cases, designated office space is not necessary for employees who work from many locations.

Review and evaluation of agency space requests is the responsibility of the Executive Director. Approval to take action is required by the CenSARA Membership.

**CATEGORY 25: PROCUREMENT PROCEDURES FOR SAFETY OR  
ERGONOMIC EQUIPMENT OR SUPPLIES**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

CenSARA avoids purchasing unnecessary items, including Safety or Ergonomic Equipment or Supplies that do not meet the employees' needs. To avoid unnecessary purchases, the Executive Director may request a physician's statement of need for individual employees. Annually, (usually in September), a price analysis is performed on the most frequently purchased office supplies in the previous 11 months.

Purchase orders for the previous 11 months will be examined to determine types and quantities of equipment or supplies utilized. A representative sample of items purchased will be used to secure vendor prices for the next fiscal year.

A format for price comparison may look like the following table.

Safety or Ergonomic Equipment or Supplies	Vendor #1 Prices	Vendor #2 Prices	Vendor #3 (MBE/WBE) Prices
Frequently Purchased Item #1			
Frequently Purchased Item #2			
Frequently Purchased Item #3			

CenSARA will maximize the involvement of MBE/WBE in the procurement process by contacting the U.S. EPA or other granting agencies and other national, regional, and state (Oklahoma) listings of small businesses, minority-owned businesses, or woman-owned businesses to secure at least one vendor for bidding that represents a Minority-Owned Business Enterprise or Woman-Owned Business Enterprise (MBE/WBE) when available.

Other considerations in determining a successful bidder may include amount of shipping fees (if applicable), delivery methods and length of time between orders and delivery, in-store versus catalog access only, and other considerations.

Routine purchases of safety supplies will occur with the successful vendor during the period of October 1, of one year through September 30, of the following year. Discounted merchandise offered for sale below the regular purchase price with the approved vendor may be purchased through other vendors provided the items are needed.

A purchase of safety equipment in excess of \$100.00 in a single transaction requires a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email. Blanket approval for a fiscal year may also be done for routine items that do not exceed \$1,200.00 on an annual basis.

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Procurement Records – Documents prepared for the annual cost analysis for Safety or Ergonomic Equipment or Supplies will be kept in the CenSARA Contract Files for the effective year and the previous year. Records that are two years old will be archived.

**CATEGORY 26: PROCUREMENT PROCEDURES FOR THE MOVING OF OFFICE FURNISHINGS**

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

**PROCUREMENT PROCEDURES FOR THE MOVING OF OFFICE FURNISHINGS**

CenSARA avoids purchasing unnecessary items, including the moving of office furnishings. These services are infrequent and when needed are purchased through the Oklahoma Department of Corrections, Prison Enterprises. This is currently a set aside program that goes towards meeting CenSARA's goal of utilizing federal grant dollars in support of Disadvantaged and Small Businesses, however the Executive Director may elect to utilize another company at any time, if it is more advantageous to the organization.

Moving of office furnishing transactions in excess of \$100.00 in a single transaction requires a prior approval by the Executive Director. Authority for purchases over \$100.00 is granted by the Executive Director through the action of signing either purchase orders or by giving written approval, e.g. Email.

Procurement Records – Documents prepared for the purchase of any office furniture are kept in the Accounting Files. Records that are two years old will be archived.



## HISTORICAL NOTES

**ORIGINATION DATE: 9/13/07**

**LAST UPDATED: 12/7/11**

November 3, 2010 – Category 6, Procurement Procedures for Janitorial Services: Changed Length of Service Agreement Language From “a 3 year period” to “up to a 3-year period (in conjunction with the length of the office rental agreement)” and Updated Job Titles to Reflect Current Policy Manual.

November 3, 2010 – Category 12, Procurement Procedures for Conferences, Meetings, and Training Locations: Removed Job Titles No Longer Employed by CenSARA and Changed Other Titles to Reflect Current Personnel Policy.

November 3, 2010 – Category 19, Procurement Procedures for Health Insurance, Dental Insurance, and Life Insurance: Added Provision to Ensure Geographic Coverage Sufficient to Include All Covered.

November 3, 2010 – Category 23, Procurement Procedures for Proprietary (sic) Supplies and Services”: Changed misspelling in title – Proprietary.

December 7, 2011 – Title Page and throughout document: References to CENRAP removed.

December 7, 2011 - Category 5, 7, 10, 12, 13, 22, 23, 25, 26: Purchase Threshold of \$100.00 Created Requiring Prior Approval, \$1200.00 Blanket Purchase Order Option Created For Regularly Purchased Items.

December 7, 2011 – Category 5, Procurement Procedures for Office Supplies: Revisions Include General Grammatical Clarifications, Updating of Job Titles.

December 7, 2011 – Category 6, Procurement Procedures for Janitorial Services: Revisions Include General Grammatical Clarifications, Updating of Job Titles.

December 7, 2011 – Category 10, Procurement Procedures for Office Furniture: Revisions Include Additional Language Giving the Executive Director Authority to Utilize Other Companies Outside of The DBE Program if it’s in the Best Interest of CenSARA.

December 7, 2011 – Category 11, Procurement Procedures for Information Technology: Revisions Include General Language Clarifications Allowing CenSARA Staff to Consult Expert Staff When Doing Price Analysis.

December 7, 2011 – Category 12, Procurement Procedures for Conferences, Meetings and Training Locations: Revisions Include Removal of Purchase Authorization Table for Employees, Contracts Will Be Reviewed By Two Staff Members, but Final Authorization Must Be Made By Executive Director. The Office Manager Obtain Competitive Price Bidding When Procuring Refreshments.

December 7, 2011 – Category 15, Procurement Procedures for Air Quality Training: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 17, Procurement Procedures for Contracts Issued Under the MAS: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 18, Procurement Procedures for Contracts Issued Under a Request for Proposals: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 19, Procurement Procedures for Health Insurance, Dental Insurance, and Life Insurance: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 20, Procurement Procedures for OMB A-133 Audit Services: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 21, Procurement Procedures for Telecommunications: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 22, Procurement Procedures for Education and Outreach Items: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 23, Procurement Procedures for Proprietary Supplies: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 24, Procurement Procedures for Office Space: Revisions Include General Grammatical Clarifications.

December 7, 2011 – Category 25, Procurement Procedures for Safety Equipment: Revisions Include General Grammatical Clarifications, and Authorization for Executive Director to Require Proof of Medical Condition before Ergonomic Equipment is Purchased on for an Employee.

December 7, 2011 – Category 26, Procurement Procedures for the Moving of Office Furnishings: Revisions Include General Grammatical Clarifications, and Additional Language Giving the Executive Director Authority to Utilize Other Companies Outside of The DBE Program if it's in the Best Interest of CenSARA.