



STATE OF WASHINGTON
DEPARTMENT OF GENERAL ADMINISTRATION

OFFICE OF STATE PROCUREMENT

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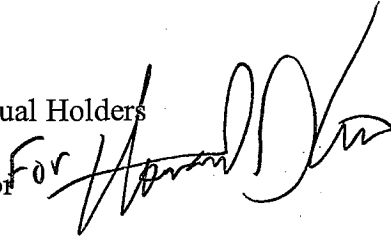
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May 1, 2007

OSP Directive 07-05

TO: Agency Directors and Policy Manual Holders

FROM: Kenneth Harden, Assistant Director

For 

SUBJECT: Revision of Chapter 3 Glossary, Chapter 6 Applying the Principles of Purchasing, Chapter 7 Delegated Purchases and Chapter 10 Best Practices

We are revising several chapters of the state of *Washington Purchasing Manual* issued by the Department of General Administration. The effective date of these revisions is May 10, 2007 and agencies have until July 10, 2007 to implement these changes. These revisions include numerous policy updates.

Key changes to the policies include:

- Addition of words or phrases to the glossary
- Revising policy requirements regarding state contracts to align with statutory requirements
- Clarifying requirements regarding opportunities for people with disabilities
- Updated requirements regarding products containing recycled materials
- Adding guidance regarding pre bid conferences and site visits
- Revising requirements regarding protests to align with administrative rule requirements
- Addition of scrap materials delegation to state agencies
- Identifying using and managing customer feedback as a Best Practice

Changes to statewide purchasing policy as contained in the Washington Purchasing Manual are as follows: (note – page numbers are referenced to the August 2006 edition)



Chapter 3 Glossary

Revised meaning for “All of nothing award” to clarify that an all or nothing award is made to a single Contractor

Added “Amendment” to the Glossary

Revised meaning for “Best Buy” to remove “mandatory or convenience” when referring to state contracts

Revised “Competitive Procurement Standards (CPS)” to remove Certification of Inmate wages as part of the CPS

Removed “Convenience Contract” from Glossary

Replaced phrase “Disabled for Profit Business (DFP)” with “Disadvantaged Business Enterprise (DBE)”

Removed “Mandated Contract” from Glossary

Removed “Mandatory Use Contract” from Glossary

Added “Order Document” to Glossary

Added “Procurement Coordinator” to Glossary

Added “Purchaser” to Glossary

Revised “Recycled material” to clarify the current definition

Revised “Request for Proposal (RFP)” to clarify the current definition

Revised “Responsible bidder” to clarify the current definition

Added “State” to the Glossary

Added “State Contract” to the Glossary

Added “Subcontractor” to the Glossary

Chapter 6 Applying the Principles of Purchasing

Section 6.1.c, page 30 – removed all instances of “mandatory” or “convenience” when referring to state contracts. Added the following 2 bullets to the required use exemptions list for state agencies:

- The contract specifically limits purchases to certain agencies
- The contract specifically grants an agency authority to use the contract at their discretion

Section 6.1.e, page 31 – revised the 1st sentence to clarify that an agency is authorized to make a direct buy only when the agency has delegated authority and the purchase is not otherwise prohibited.

Section 6.1.i, page 35 – replaced all instances of “DFP” with “DBE”.

Section 6.2, page 38 – Removed “Certificate of Inmate Wages” (1st bullet) from the list of required use forms. Removed all instances of “mandatory” (9th and 10th bullets) when referring to state contracts.

Section 6.3.c, page 40 – Added new section titled PRE BID CONFERENCES AND SITE VISITS. This addition does not remove the current Section 6.3.c. The current section 6.3.c and following sections are moved forward and re-numbered.

Section 6.3.f, pages 42 through 43 – Changed the requirement regarding consideration of prompt payment discount during the price evaluation to optional. Changes are found in the 1st bullet under the heading titled “Price or Cost”, in the formula box under the heading titled “Price or Cost”, and in all paragraphs under the heading titled “Prompt Payment”.

Section 6.3.f, page 43 – removed the heading and associated contents titled “Correctional Industries Contractor”.

Section 6.3.f, page 43 – revised the entire content under the heading titled “Recycled Material”.

Section 6.4, page 48 – revised the entire content of this section.

Section 6.11, page 54 - 55 – Revised this section to align policy with statutory requirements. State law in regard to state contracts does not qualify nor makes any distinction between types of state contracts such as mandatory or convenience. Removed the mandatory modifier in regard to state contracts in the second paragraph. Removed the last sentence from the 5th paragraph in regard to excluding convenience use contracts from the Best Buy Program.

Section 6.13, page 56 – Revised the 1st and 2nd paragraphs in this section to improve clarity.

Section 6.14, page 56 – Added new section titled DISPOSING OF STATE SURPLUS PROPERTY. This addition does not remove the current Section 6.14. The current section 6.14 and following sections are moved forward and re-numbered.

Section 6.16, page 62 – this section is re-numbered as 6.17 and revised in its entirety to clarify the statutory and policy requirements in regard to expanding opportunities for people with disabilities.

Section 7 Delegated Purchases

Sections 7.1.b.2 through 7.1.b.8, page 66 – revised the 1st sentence of each of these sections to clarify that agencies are only delegated purchase authority if no state contracts exist.

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Section 7.2, page 66 - revised the 2nd sentence of the introductory paragraph of this section to clarify that agencies are only delegated purchase authority if no state contracts exist.

Section 7.2.r, page 69 – replaced all instances of (DFP) with (DBE).

Section 10.2, page 74 – revised this entire section to only directly identify only solicitation templates and contracts.

Section 10.4, page 81 – Removed Printing/duplicating service from the table listing examples of GA Purchased Services to clarify that printing/duplicating services are under the purview of the State Printer.

The policies and procedures prescribed in the Washington Purchasing Manual are the minimum requirements that state agencies must meet. An agency may adopt more restrictive or detailed polices as long as the agency meets the required minimum standards.

All OSP directives and policies are available on our web site at:
<http://www.ga.wa.gov/PCA/Manual.htm>

Questions regarding policy content and proper interpretation of the purchasing polices contained in the Washington Purchasing Manual should be directed to Mr. Jack Zeigler of my staff at jzeigle@ga.wa.gov.

cc: Jack Zeigler, Policy & Protest Manager