

The following considerations are vital to state procurement. While the Shared Services Center (SSC) will be checking for compliance and fulfilling many of the requirements herein, this checklist will guide requesters in making sound procurement decisions before SSC involvement.

1	Mandatory Sources
<input type="checkbox"/>	<ul style="list-style-type: none"> • Any goods/services provided by a mandatory source <i>must</i> be purchased from that source. The following are examples of the types of items supplied by the most frequently used mandatory sources: <ul style="list-style-type: none"> ○ Virginia Distribution Center (VDC) – food, beverages, paper products, cleaning supplies, work gloves ○ Virginia Industries for the Blind (VIB) – pens, pencils, markers, latex/nitrile gloves, spices ○ Virginia Correctional Enterprises (VCE) – clothing, printing, furniture, janitorial supplies • If a mandatory source supplies essentially the same goods/services, a waiver must be obtained before purchasing from a different source. <p style="margin-left: 40px;">Example: VIB supplies pens but does not supply purple ink pens. A waiver is required before buying purple ink pens from another source.</p> • SSC will request all mandatory source waivers. • See eVA for all mandatory sources.
2	Contracts
<input type="checkbox"/>	<ul style="list-style-type: none"> • A <i>mandatory</i> state contract <i>must</i> be used, if available. The following are examples of mandatory contracts commonly used by the VCCS: <ul style="list-style-type: none"> ○ E194-73167 - Paper, Fine, and Plain Envelopes ○ E194-74980 - Gases: Medical, Laboratory, Protocol, Audit and Welding ○ E194-76552 - Clothing, Accessories & Footwear • Optional contracts often provide favorable prices and/or terms and should be considered before looking for other vendors. The following are examples of optional contracts commonly used by the VCCS: <ul style="list-style-type: none"> ○ E194-250 - Laboratory Equipment and Supplies ○ E194-72989 - Personnel Services, Temporary ○ E194-80584 - Facilities Maintenance, Repair & Operations (MRO) and Industrial Supplies • See the Statewide Contracts page for a full listing of Mandatory and Optional contracts. Some contracts may only be used with Punch-out catalog items.

3	<h3 style="text-align: center;">Requirement for Competition</h3>
<input type="checkbox"/>	<ul style="list-style-type: none"> • Competition (public solicitation) is required if a purchase is expected to be above \$10,000, unless the purchase is <ul style="list-style-type: none"> ○ from a mandatory source, ○ in scope of a valid contract, or ○ exempt from competitive requirements (see APSPM §1.5). • If the purchase is \$10,000 or less, no competition is required, but a single quote <i>must</i> be documented from a Micro vendor if available (APSPM §5.3, also see below). • If competition is required, submit a Requisition to the Shared Services Center (SSC).
4	<h3 style="text-align: center;">Supplier Diversity (Executive Order 35)</h3>
<input type="checkbox"/>	<ul style="list-style-type: none"> • If the purchase is \$10,000 or less, you must use a certified Micro vendor, if available. If a Micro vendor is not available, a Small vendor should be used. • If a Micro vendor is not selected for a purchase of \$10,000 or less, justification for the use of a non-Micro vendor must be documented and supported by sufficiently detailed facts. Justification might include one of the following: <ul style="list-style-type: none"> ○ The Micro vendor's prices are more than 5% greater than those of an uncertified vendor or are otherwise not fair and reasonable (Executive Order 35). ○ The Micro vendors found are not responsive or responsible. ○ No Micro vendor could be found to provide the goods/services. <p>EXCEPTIONS (APSPM §3.11.g.2):</p> <p>A purchase is exempt from use of a Micro/Small vendor if the purchase is</p> <ul style="list-style-type: none"> ○ from a mandatory source, ○ in scope of a valid contract, ○ exempted from competition by APSPM §1.5b or §1.5d, or ○ exempted from eVA fees by APSPM §14.9d(1-17) or §14.9e(2-11). <ul style="list-style-type: none"> • Over-the-Counter P-Card purchases are <i>NOT</i> inherently exempt from the requirement to use a Micro vendor.

5	Pricing Verification
<input type="checkbox"/>	<ul style="list-style-type: none"> • All purchases must have evidence documented that the pricing is correct. Pricing verification might include one of the following: <ul style="list-style-type: none"> ○ Punch-out catalog price ○ Written quotation from the vendor (e.g., PDF, e-mail, or a scanned handwritten quote) ○ Contract price (attach or reference the contract) ○ Screenshot from the vendor's website ○ Documentation of an oral quote (must include all elements specified by APSPM §5.3b) ○ Receipt (for over-the-counter P-card purchases and other confirming orders) <p><u>Freight/shipping:</u></p> <p>All freight or shipping fees should be included in the vendor's item prices. If VCCS agrees to pay shipping, the vendor must quote the actual or estimated cost, and it must be requisitioned as a separate line item (APSPM §4.13). The line item should have both the correct account number ("61219") and correct NIGP code ("96286") for inbound freight.</p> <p>Vendors who do not quote freight/shipping charges are prohibited from adding them after the fact.</p>
6	Insurance
<input type="checkbox"/>	<ul style="list-style-type: none"> • If a service will be performed on property owned or leased by the Commonwealth, documentation of the vendor's liability insurance is required. (APSPM §4.14) This is typically demonstrated with a valid Certificate of Insurance (COI). (See Appendix B for requirements.) <p>The Shared Services Center will request the COI.</p> <p>EXCEPTIONS:</p> <ul style="list-style-type: none"> ○ Delivery alone does not require insurance coverage. ○ Speakers may sign the Speaker Agreement in lieu of providing insurance coverage. The Shared Services Center will request the signature.

7	Other Documentation
<input type="checkbox"/>	<ul style="list-style-type: none"> • Some purchases require extra documentation. Examples include: <ul style="list-style-type: none"> ○ Contracts/Signatures: If a vendor requires that a quote/agreement be signed, a signed Contract Addendum form often must be attached (APSPM §4.26). The Shared Services Center will request this from the vendor. The vendor is encouraged to sign their own forms, if necessary, before submitting to the SSC. ○ Meals/Catering: Food purchased for faculty/staff requires documentation of approval from the agency head or designee (CAPP Manual Topic 20335). Use the SSC Business Meal Approval Request Form found on the SSC Forms Library. ○ Blanket Orders: Blanket Orders must be justified by an analysis of past spend and/or expected future need.
8	Improper Expenditures
<input type="checkbox"/>	<ul style="list-style-type: none"> • Some purchases are prohibited, regardless of justification, unless an approved exemption is documented. Prohibited purchases include, but are not limited to: <ul style="list-style-type: none"> ○ Employee personal expenses, such as <ul style="list-style-type: none"> - payment of traffic fines - repairs to non-uniform clothing damaged in the workplace ○ Agency-sponsored event expenses which do not clearly support the agency mission such as <ul style="list-style-type: none"> - holiday decorations - gifts or flowers • See CAPP Manual Topic 20310 for more information about Improper Expenditures. • Purchases funded by the President's discretionary fund are not subject to this prohibition (VCCS Policy 4.2.2f). Purchases funded by grants may not be subject to this prohibition if allowed by the grantor. Any exceptions must be thoroughly documented.