

# STATE OF ALABAMA

## DEPARTMENT OF FINANCE

### DIVISION OF PURCHASING

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# PURCHASING STAFF

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- **Staff Introductions**
- **Complete list of staff on our website:**  
[www.purchasing.Alabama.gov](http://www.purchasing.Alabama.gov)  
click the link “Purchasing Staff”
- **“Purchasing Staff” page contains major commodities under the responsible buyer**

# GENERAL NOTES:

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- **Pcard**
  - **Contractual obligations**
- **Fuel card**
  - **Contractual obligations**
  - **Latest developments**
- **Service Requisitions**
  - **Timely submission effective 10/1/2019**
  - **Within 30 days of beginning of service**
- **Approval to pay letters**
  - **Under \$15,000**
  - **Rare occurrence**

# EMERGENCY DECLARATIONS NOTES:

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- **§41-16-72 – For professional services – 60 days**
- **§41-16-23 – For goods and non professional services – 1 year**

# TRAINING NOTES:

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## **Professional Service VS Non-professional Service**



Kay Ivey  
Governor  
  
Kelly Butler  
Director of Finance

STATE OF ALABAMA  
Department of Finance  
Division of Purchasing

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www.purchasing.alabama.gov



Michael A. Jones  
State Purchasing Director  
  
Jerry W. Young  
State Purchasing Deputy Director

MEMORANDUM

TO: All State Procurement Officers and Agency Accounting Staff  
FROM: Michael A. Jones, State Purchasing Director  
Kathleen D. Baxter, State Comptroller  
DATE: May 6, 2019  
RE: Training & Conferences

In response to recent questions regarding fiscal requirements for procuring and paying for training and conferences the following guidelines are provided.

**Registration Fees for Conferences and/or Training:**

A procurement document is not required for training courses and/or conference registration fees. Generally, these are events held by outside entities in which state employees are not the only participant. Training course and/or conferences (as described above) may be directly paid using a GAX document. If a vendor requires a purchase order, State Purchasing will accommodate.

**State Agency Procuring the Services of a Trainer:**

If an agency is procuring the services of a trainer and this service requires an individual that would meet the definition of a professional service (*Code of Alabama 1975, §41-16-71, as amended*), this training should be procured through the RFP/Professional Service Contract process.

For questions related to professional services contracts please contact Randy Head at 334-353-9275, [Randy.Head@Comptroller.alabama.gov](mailto:Randy.Head@Comptroller.alabama.gov).

If an agency is procuring the services of a trainer and this service requires an individual that does not meet the requirements to be considered a professional service (*Code of Alabama 1975, §41-16-71, as amended*), then these services will be handled as non-professional services and will follow the Division of Purchasing procedures.

For questions related to non-professional services please contact Kerri Butler at 334-353-0303, [Kerri.butler@purchasing.alabama.gov](mailto:Kerri.butler@purchasing.alabama.gov) or Brittany Peterson at 334-242-4667, [Brittany.peterson@purchasing.alabama.gov](mailto:Brittany.peterson@purchasing.alabama.gov).

Instructions on the procurement process can be found in the Fiscal Policy and Procedures Manual located on the [Comptroller's website \(www.comptroller.alabama.gov\)](http://www.comptroller.alabama.gov).

# REMINDERS:

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- **PARI documents for priority authorizations**
  - **Must include a justification (commodity tab – commodity specs field)**
  - **Must use non encumbering event type PR07 (during shut down)**
- **RQN**
  - **Does not encumber**
  - **Document ID must begin with “20N”**

## REMINDERS:

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- **For office supplies only, include “Ship order” or “Order online” in Header Extended Description and Commodity Extended Description**
- **Line type of Service vs Item**
  - **Service = varying payments until total amount expended**
  - **Item = fixed payment based on quantity**
- **Use only 5 or 7 digit commodity codes unless on an existing MA or for inventory items**
  - **3 Digit commodity code does not assign a buyer**



# FY19 EOY SCHEDULE

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- **June 24** – **FY19 Information Technology bids requiring OIT approval**
- **June 27** – **FY19 bids requiring a site visit**
- **July 8** – **All other FY19 bids**
- **August 7** – **All FY19 award letters must be received**
- **August 19** – **Last day to accept FY19 documents**
- **Sept 16** – **Last day for FY19 documents to include modifications**
- **Sept 19-30** – **FY19 modifications will not be processed**

# FY20 EOY SCHEDULE

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- **August 12 – Begin submitting FY20 RQN's**
- **Sept 17 – Last day for FY20 RQN's**
- **October 1 – Begin submitting FY20 DO's**

# EOY SCHEDULE CONT'D

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- **September 17 thru 30 – Shutdown, use only non-encumbering PARI for critical purchases. PO and DO modifications cannot be processed during this time.**

# STAFF REPORTS

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- **Cell phone contract**
  - **Extended to 9/30/2019**
  - **Working to establish new contract**
- **Mail machines**
  - **Expires 7/13/2019**
  - **Working to establish new contract**
  - **If lease expires after 7/13/2019**
    - **Submit RQ\* to obtain PO for remaining lease**

# STAFF REPORTS

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- **Shredding Services**
  - **Formerly Secure Destruction**
  - **Now Vital Records**
  - **More changes**

# ePROCUREMENT

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- **Assessment of procurement processes**
- **Solicitation**
- **3 part goal**
  - **Agency efficiencies**
  - **Vendor efficiencies**
  - **Central office efficiencies**



# CONTRACT PRODUCT SHOW

SET SAIL ON A NEW ADVENTURE



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 **November 8, 2019**

 **Format change**

 **Procurement training opportunities  
in the morning**

 **Contract product show in the  
afternoon**



# BEFORE YOU LEAVE

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- **Please update your contact information on the sheets provided on the tables out front and sign up for office supply training.**
- **If you need to be added to the list for receiving Campaign Intelligence notifications, please email STAARS Support to request being added.**

[Staars.support@finance.alabama.gov](mailto:Staars.support@finance.alabama.gov)

- **Slide show will be available on the Purchasing website under Purchasing News.**

[www.purchasing.alabama.gov](http://www.purchasing.alabama.gov)



**BON VOYAGE!**

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**Save the date: November 8, 2019**

