

Training Services Matrix (07-24)

Customized Training

Definition:
Specifically developed for the requesting department.

- **Solicitation Requirements:**
 - **≤ \$20,000:** None (but highly encouraged) except if required by grant or other funding source.
 - **> \$20,000 and < \$200,000:** Informal RFP to a minimum of three bidders, in accordance with Chapter 21, unless solicitation requirements are waived by OCA.
 - **≥ \$200,000:** 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:**

≤ \$20K	"PROFSERV-20K"
> \$20,000 and < \$200K	"PROFSERV-BID"
≥ \$200K	"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:**
 - **≤ \$20,000:** None (but highly encouraged), unless required by grant or other funding source.
 - **> \$20,000 and < \$1,000,000:** If possible, request quotes from a minimum of three bidders.
 - **≥ \$1,000,000:** 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 stand-alone PO without City's software license terms 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:**

≤ \$20K	"NON-PURCHASING"
> \$20,000 and < \$1,000,000	"NON-PURCHASING"
≥ \$1,000,000	"NON-PURCHASING"
Waived	"NON-PURCHASING"

How to Create a Non-Purchasing (NP) Purchase Order that Does Not Route to OCA

Step 1: Open a new PO

1 Manage Purchase Orders

2 Add/Update POs

3 Add a New Value

4 Add

Step 2: Click on the PO Header to open a dialogue box.

Maintain Purchase Order

Purchase Order

Business Unit SFGOV

PO ID NEXT

Copy From

5 Header Details

- Header Details
- Activity Summary
- PO Defaults
- Add Comments
- PO Activities
- Add ShipTo Comments
- Actions

Step 3: When the dialogue box opens, enter “NP” into the “PO Type” field. Close box.

PO Header Details

6 PO Type NP

Supplier WWONGCONST-001

PO Date 05/11/2023

Budget Status Not Chk'd

Origin

Letter of Credit ID

Ship To

Use One Ship To

Currency

Currency Code USD

Exchange Rate Detail

Base Currency USD

Exchange Rate 1.00000000

Rate Date 01/01/1901

Rate Type CRRNT

Step 4: In the PO, enter “NP” into the PO “Purchasing Authority” field.

Header

*PO Date 05/11/2023

*Supplier WWONGCONST-001

*Supplier ID 000003017

*Supplier HQ

*Buyer

PO Reference

Priority Medium

Doc Tot Status Valid

Receipt Status Not Recvd

*Dispatch Method Print

7 Purchasing Authority NON-PURCHASING

Amount Summary

Merchandise	0.00
Freight/Tax/Misc.	0.00
Total Amount	0.00 USD

Calculate