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The Cal State Fullerton Campus

California State University, Fullerton is one of 23 campuses in the California State University System, which is the largest and most diverse university system in the country. The campus is one of the largest CSU campuses with over 38,000 students enrolled in the fall of 2013, over 2,000 full and part-time faculty, and over 1,800 full and part-time staff.

The main campus was founded in 1957 by act of the California Legislature. Classes began in fall 1959 in facilities leased from the Fullerton Union High School District, and classes on the main campus site began in fall 1960. The campus is located on 236 acres in Orange County at 800 N. State College Blvd., Fullerton, CA 92831, with a branch campus in Irvine, CA. Other Cal State Fullerton facilities are Desert Studies Center at Zzyzx Road, Grand Central Art Center, Tucker Wildlife Sanctuary, and Garden Grove Center.

As part of The California State University, Cal State Fullerton is subject to policies established by the California Legislature and the CSU Board of Trustees. Governance at the campus level is the responsibility of the President. The President has delegated authority to the Contracts and Procurement Office to enter into contracts for materials, supplies, equipment, services and construction projects.

Contracts and Procurement

Contracts and Procurement (C&P) resides within Business & Admin Services in the Division of Administration and Finance, and is responsible for the development, maintenance, and administration of the procurement function on campus. This is accomplished via professional contracting and purchasing practices incorporating “leading edge” procurement strategies and “best practices.”

General Information

Physical Address: 2600 E. Nutwood Avenue, Suite 300
Fullerton, CA 92831

Mailing Address: P.O. Box 6808
Fullerton, CA 92834-6808

Office Phone/Fax: 657/278-2411 P
657/278-5230 F

Website: http://finance.fullerton.edu/procurement

Office Hours: Monday – Friday, 8:00 a.m. – 5:00 p.m., excluding legal and CSU holidays

Questions/Add to Vendor Database: Email procurement@fullerton.edu

Buy Recycled Coordinator: Hector Muniz, Buyer III
657/278-5136
Small Business/DVBE Coordinator: Hector Muniz, Buyer III  
657/278-5136

Our Mission and Vision

The Office of Contracts and Procurement advances University goals and objectives through timely acquisitions of goods and services through:

- Supporting the University's commitment to provide quality education for all students
- Consistent application of State, CSU, and institutional policies to ensure appropriate stewardship of public and private funds
- Establishing effective partnerships with valued suppliers, distributors, non-profit and public agencies, and other CSU campuses
- Training, motivating and challenging our campus community towards excellence and “proactive” team involvement

Our vision is to become a leader in innovative and technologically proficient procurement operations. This shall be accomplished through collaborative stakeholder involvement promoting an environment inspiring creativity, efficient productivity, and empowering everyone to continually strive for excellence.

NAEP Code of Ethics

To strengthen ethical awareness and provide guidance to the campus, Contracts and Procurement has adopted the National Association of Educational Procurement Code of Ethics as follows:

1. Give first consideration to the objectives and policies of my institution.
2. Strive to obtain the maximum value for each dollar of expenditure.
3. Decline personal gifts or gratuities.
4. Grant all competitive suppliers equal consideration insofar as state or federal stature and institutional policy permit.
5. Conduct business with potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentation.
6. Demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement, or a sample of the product.
7. Receive consent of originator of proprietary ideas and designs before using them for competitive purchasing purposes.

8. Make every reasonable effort to negotiate an equitable and mutually agreeable settlement of any controversy with a supplier; and /or be willing to submit any major controversies to arbitration or other third party review, insofar as the established policies of my institution permit.

9. Accord a prompt and a courteous reception insofar as conditions permit to all who call on legitimate business missions.

10. Cooperate with trade, industrial, and professional associations, and with governmental and private agencies for the purposes of promoting and developing sound business methods.

11. Foster fair ethical and legal trade practices.

12. Counsel and cooperate with NAEP members and promote a spirit of unity and a keen interest in professional growth among them.

Adopted by Contracts and Procurement at Cal State Fullerton

Procurement of Goods

C&P issues purchase orders or contracts for the acquisition of goods and materials upon receipt of authorized requisition from a requesting department. The completed purchase order may be emailed, faxed, or mailed to the vendor. It is the vendor’s responsibility to advise the appropriate buyer listed on the order if the requested items, pricing, or delivery date cannot be met. Goods and materials are subject to the CSU General Provisions for Acquisition of Goods, which may be found at http://www.calstate.edu/CSP/crl/GP/GP.shtml.

NOTE: Vendors are advised that a valid purchase order issued by the Contracts and Procurement Office is required for all purchases. Purchases made in the name of the University without an authorized purchase order is considered a personal obligation of the individual and are not binding on the University.
Procurement of Services

C&P issues services orders or service contracts for the acquisition of various services upon receipt of authorized requisition from a requesting department. Services include but are not limited to maintenance, consulting, equipment rental, leases, professional services, and independent contractor work. Services are subject to the CSU General Provisions for Service Acquisitions, which may be found at http://www.calstate.edu/CSP/crl/GP/GP.shtml.

**NOTE:** Vendors are advised that a valid purchase order issued by the Contracts and Procurement Office is required for all services. Purchase of services made in the name of the University without an authorized service order is considered a personal obligation of the individual and are not binding on the University.

Construction

Construction, or Public Works projects, are designed, administered, and managed on the campus in accordance with CSU Major Capital Outlay policies and procedures, and require the approval of the Office of General Counsel.

Major Capital Projects have a value greater than $600,000 and Minor Capital Projects have a value of less than $600,000.

Projects under $5,000 do not require bid and award may be made without competition. Minor Capital Projects from $5,000 to $600,000 require at least three written competitive bids. On the Cal State Fullerton campus, Minor Capital projects and special repairs are typically handled via the Job Order Contract (JOC) process.

Major Capital Projects valued at $600,000 or greater are subject to the bidding provisions of the Public Contract code and CSU Contract law. Contractors must be pre-qualified through the CSU Office of the Chancellor for projects greater than $600,000.

Professional services agreements (services related to public works projects, architect or engineer agreements) are awarded through an interview process not based on lowest cost. Architects and engineers must be pre-qualified through the CSU Office of the Chancellor.

General Bid Thresholds

Acquisitions less than $50,000 do not require competition, however C&P may require formal or informal competition for any dollar procurement if it is determined that competition is advantageous or necessary for sound business reasons.
Acquisitions greater than $50,000 and less than $250,000 may be awarded to a Certified Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) as long as price quotations have been obtained from two or more Certified Small Businesses or Disabled Veteran Enterprises.

Acquisitions of $50,000 or greater are formally advertised and bid via an Invitation for Bid (IFB) solicitation or a Request for Proposal (RFP) solicitation.

The Bid Process

Cal State Fullerton utilizes CSU Systemwide Agreements, Master Pricing Agreements, strategic sourcing, cooperatives and consortiums, and various other purchasing programs whenever possible to achieve maximum discounts through volume purchases.

Formal solicitations (IFB’s or RFP’s) for the acquisition of goods or services require published advertising in Bidsync. Contracts and Procurement will advertise formal solicitations for goods or services greater than $50,000 and either post the bid documents directly onto the site for downloading, or furnish bid documents upon written request from interested parties.

The bid or proposal will indicate the specific date and time for the sealed bid responses to be publicly opened and read. Bids received after the closing date and time will be rejected. After the bid opening, Contracts and Procurement will evaluate all submittals to determine final awardee in accordance with the evaluation criteria listed in the bid or proposal documents.

CSU and State contracting opportunities may be viewed at http://www.bidsync.com

CSU Insurance Requirements

CSU Risk Management Technical Letter RM 2012-01 requires all contractors, consultants, vendors and suppliers providing services to CSU campuses to provide evidence of Insurance with General Liability Endorsement and Business Auto Liability Endorsement. Evidence of insurance and policy endorsement must be provided prior to commencement of services.

Insurer must have minimum coverage set forth as follows:

- General Liability: comprehensive or commercial form minimum limits each Occurrence $1,000,000, General Aggregate $2,000,000, Producuts/Completed Operations Aggregate $1,000,000
- Business Automobile Liability: minimum limits for Owned, Scheduled, Non-Owned, or Hired Automobiles with a combined single limit of not less than $1,000,000 per occurrence
- Workers’ Compensation as required under California State Law with Employer’s Liability $1,000,000 (Note: WC certificate or waiver is required for Sole Proprietors).

All certificates of insurance issued to the University require the following:
• Provide written notice that should any of the above described policies be cancelled before the expiration thereof, notice will be delivered in accordance with the policy provisions
• Provide for Acceptability of Insurers rating, A.M. Best: A VII or equivalent unless otherwise agreed to by the University
• Separate Policy Endorsement containing the following language:
  ▪ Name the State of California, the Trustees of the California State University, California State University, Fullerton, and the officers, employees, volunteers and agents of each of them as additional insureds except for professional liability and worker’s compensation insurance (If agreement is with an Auxiliary, then the Auxiliary shall also be named)
  
  Or
  ▪ Blanket or Supplemental Endorsement specifying any person or organization is an additional insured via written contract or agreement.

Deliveries

Deliveries may be made to the central Shipping and Receiving Department, 800 N. State College Blvd., Fullerton, CA 92831, between 7:30 a.m. and 4:30 p.m. Vendors are required to reference the purchase order number on all packing slips. Shipping and Receiving may be reached at 657/278-2531.

Invoices

Vendors are to mail all invoices to the Accounts Payable Office, CP- 300, P.O. Box 6808, Fullerton, CA 92834-6808. Reference the purchase order or contract number to prevent delays in processing payments. Accounts Payable may be contacted by phone at 657/278-4278 or by email at AP@fullerton.edu.

Vendor Data Record

All vendors doing business with Cal State Fullerton are required to complete a Vendor Data Record, Form 204, prior to payment. This information is utilized for 1099 reporting and for withholding on payments to nonresident vendors. Timely completion of this form will ensure payments will be processed without delay. Additional information may be found at http://finance.fullerton.edu/documents/controller/accountspayable/forms/VD204_Form.pdf.

Small and Micro Businesses

Cal State Fullerton makes a diligent effort to meet the goals established by the Office of Small Business and DVBE Services for small business vendors, including micro businesses, in the acquisition of goods, services, and information technology and construction projects.
Small Business Preference

A certified small business may claim a 5% small business preference for applicable solicitations provided evidence of certification from the Office of Small Business and DVBE Services is submitted (copy of the OSDS approval letter) to Contracts and Procurement.

For additional information, visit the Office of Small Business and DVBE Services website at http://www.pd.dgs.ca.gov/smbus/default.htm.

Disabled Veteran Business Enterprise

Cal State Fullerton makes a diligent effort to meet the 3% participation goal established by the state for Disabled Veteran Business Enterprises. For DBVE certification purposes, a disabled veteran is defined as:

- A veteran of the U.S. military, naval or air service
- The veteran must have a service-connected disability of at least 10% or more
- The veteran must be domiciled in California

For additional information, visit the Office of Small Business and DVBE Services website at http://www.pd.dgs.ca.gov/smbus/default.htm.

Parking

Daily permits can be obtained at the cost of $8.00 per day. Permit machines in the parking lots accept one and five dollar bills only. Daily permits may be purchased in Lots: A, G, and S during all hours in which permits are required. Obtain daily permits from any open permit machine and park in any lot where daily permits are valid. See campus map.
# C&P Department Listing

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<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Telephone</th>
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<tbody>
<tr>
<td>Donald Green</td>
<td>Director</td>
<td>657/278-2413</td>
<td><a href="mailto:dgreen@fullerton.edu">dgreen@fullerton.edu</a></td>
</tr>
<tr>
<td>Sally Yassine</td>
<td>Associate Director</td>
<td>657/278-4503</td>
<td><a href="mailto:syassine@fullerton.edu">syassine@fullerton.edu</a></td>
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<tr>
<td>Michael Pruitt</td>
<td>eBusiness Manager</td>
<td>657/278-3829</td>
<td><a href="mailto:mpruitt@fullerton.edu">mpruitt@fullerton.edu</a></td>
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<tr>
<td>Jeanie Aguilar</td>
<td>Contract Analyst</td>
<td>657/278-3944</td>
<td><a href="mailto:Jagular@fullerton.edu">Jagular@fullerton.edu</a></td>
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<tr>
<td>Angie Warren</td>
<td>Buyer III</td>
<td>657/278-4532</td>
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<tr>
<td>Hector Muniz</td>
<td>Buyer III</td>
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<td>Sergio Rodriguez</td>
<td>Buyer III</td>
<td>657/278-5492</td>
<td><a href="mailto:serodriguez@fullerton.edu">serodriguez@fullerton.edu</a></td>
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<td>Angellah Petruso</td>
<td>Buyer III</td>
<td>657/278-2844</td>
<td><a href="mailto:apetruso@fullerton.edu">apetruso@fullerton.edu</a></td>
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<td>Stephanie Martinez</td>
<td>Buyer I</td>
<td>657/278-44217</td>
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<td>Vacant</td>
<td>eBusiness Programs Specialist</td>
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<tr>
<td>Sue-Ellen Fox</td>
<td>Administrative Support Coordinator</td>
<td>657/278-2411</td>
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Section 1
Please Return To:

California State University - Fullerton
Division of Administration and Finance - Accounts Payable
P.O. Box 6808
Fullerton, CA 92834 - 6808
or 2600 E. Nutwood Suite 300
Fullerton, CA 92831
(657)278-3339 (657)278-5816 (FAX)
E-mail: ap@fullerton.edu

Section 2
Name and Address

Vendor's Business Name: Phone:

Sole Proprietor Owner's Full Name (last, first, MI): Fax:

Mailing Address (number and street or P.O. Box No.): E-mail:

Section 3
Vendor Entity Type

MEDICAL CORPORATION
EXEMPT CORPORATION (Non-profit)
ALL OTHER CORPORATIONS
PARTNERSHIP/LLC
ESTATE/TRUST
INDIVIDUAL/SOLE PROPRIETOR

Note: Federal, state and local entities (including school districts) are not required to submit this form

Section 4
Vendor's Taxpayer I.D. Number

If Vendor Entity Type is CORPORATION, PARTNERSHIP, ESTATE OR TRUST, enter: Federal Employer Identification No.

If Vendor Entity Type is INDIVIDUAL/SOLE PROPRIETOR, enter: Social Security No.

Note: Social Security Numbers are required for individual/sole proprietor by authority of the revenue and tax code Section 18646 (see instructions)

Section 5
Small Business DVBE Information

Check all boxes that apply

California Certified Small Business
OSBCR Certification Reference Number:

California Certified Disabled Veteran
OSBCR Certification Reference Number:

Section 6
Vendor Activity

Check the box which describes your primary business

EQUIPMENT & SUPPLIES
ATTORNEY FEES
PRIZES & AWARDS
SERVICES - NON-MEDICAL
LEGAL SETTLEMENT
ROYALTIES
SERVICES-MEDICAL
CLAIMANT PAID
OTHER (SPECIFY)
RENT
INTEREST

Section 7
Vendor Residency Status

Federal Income Tax Withholding Status (Applies to Individuals Only):

I am a U.S. Citizen
I am a Permanent Resident Alien and I have a Green Card

I am not a U.S. Citizen and I do not have a Permanent Resident Green Card

Note: All Foreign Citizens/Entities must complete a tax analysis before payments can be made.

Tax Exempt by Tax Treaty
Country of Residency:

All services related to this payment are performed outside of the United States.

California State Tax Withholding Status (Applies to all Vendors):

California Resident - Qualified to do business in CA or have a permanent place of business in CA.

California Nonresident (See Page 2) - Payments to CA non residents may be subject to state taxes.

A Waiver from CA state tax withholding is attached (From the California Franchise Tax Board).

All services for payments issued are performed OUTSIDE of the State of California.

Note: An estate is a resident if decedent was a California resident at time of death. A trust is resident if one or more trustees are CA residents. Rules for assessing State taxes differ significantly from Federal tax rules. (Please see Page 2)

Section 8
Certifying Signature

Authorized vendor representative's name (type or print): Title:

Signature: Date: Phone:

I hereby certify under penalty of perjury that the information provided on this document is true and correct. If my residency status should change, I will promptly inform you.
State of California

VENDOR DATA RECORD
(Required in lieu of IRS W-9 when doing business with the State of California)
Form 204 (CSUF 07/12)

ARE YOU A RESIDENT OR NONRESIDENT?
Each corporation, individual/sole proprietor, partnership, estate, or trust doing business with the State of California must indicate residency status along with their vendor identification number.

A corporation if it has a permanent place of business in California. The corporation has a permanent place of business in California if it is organized and existing under the laws of this state or, if a foreign corporation has qualified to transact intrastate business (e.g., a corporation engaged exclusively in interstate commerce) will be considered as having a permanent place of business in this state only if it maintains a permanent office in this state that is permanently staffed by its employees.

For individual/sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose which will extend over a long or indefinite period will be considered a nonresident.

For withholding purposes, a partnership is considered a resident partnership if it has a permanent place of business in California. An estate is considered a California estate if the decedent was a California resident at the time of death and a trust is considered a California trust if at least one trustee is a California resident.

More information on residency status can be obtained by calling the Franchise Tax Board at the numbers listed below:

From within the United States, call 1-800-852-5711
From outside the United States, call 1-916-845-6500
For hearing impaired with TDD, call 1-800-822-6268

ARE YOU SUBJECT TO NONRESIDENT WITHHOLDING?
Payments made to nonresident vendors including corporations, individuals, partnerships, estates and trusts are subject to income tax withholding.

Nonresident vendors performing services in California or receiving rent, lease or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for state income taxes. However, no California tax withholding is required if total payments to the vendor are $1500 or less for the calendar year.

A nonresident vendor may request that income taxes be withheld at a lower rate or waived by sending a completed form FTB 588 to the address below. A waiver will generally be granted when a vendor has a history of filing California returns and making timely estimated payments. If the vendor activity is carried on outside of California or partially outside of California, a waiver or reduced withholding rate may be granted. For more information, contact:

Franchise Tax Board
Withhold at Source Unit
Attention: State Agency Withholding Coordinator
P.O. Box 651
Sacramento, CA 95812-0651
Telephone: (916)845-4900
Fax: (916)845-4831

If a reduced rate of withholding or waiver has been authorized by the Franchise Tax Board, attach a copy to this form.

FOREIGN CITIZENS and FOREIGN BUSINESSES
Federal tax withholding regulations differ significantly from California tax withholding requirements. A tax analysis consultation and additional forms must be completed before a payment can be released.

Privacy Statement

Section 7(b) of the Privacy Act of 1974 (Public Law 93-5791) requires that any federal, state, or local governmental agency which requests an individual to disclose his social security account number shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.

The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State must provide their Taxpayer Identification Number (TIN) as required by Revenue and Taxation Code Section 18646, to facilitate tax compliance enforcement activities and preparation of Form 1099 and other information returns as required by Internal Revenue Code Section 6109(a). The TIN for individuals and sole proprietors is the Social Security Number (SSN).

It is mandatory to furnish the information requested. Federal law requires that payments for which the requested information is not provided be subject to a 31% withholding and state law imposes noncompliance penalties up to $20,000.

You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the state agency (ies) with which you transact that business.

Please call the Department of Finance, Fiscal Systems and Consulting Unit at (916)324-0385 if you have any questions regarding this Privacy Statement. Questions related to residency or withholding should be referred to the telephone numbers listed above. All other questions should be referred to the requesting agency listed in section I.

Note: An estate is a resident if decedent was California resident at time of death. A trust is a resident if one or more trustees have California residency.

Rev 02/06
Please note that the map is not to scale.