



# Procurement Symposium

## Centralization Updates / Discussion

*October 20, 2025*

# MONTANA PROCUREMENT ACT

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## TITLE 18, CHAPTER 4

- Designates the Department of Administration as the sole contracting officer for the state of Montana for all branches, agencies, divisions and subparts unless an agency has a specific exception
- All statewide contracts, except infrastructure, must follow the Procurement Act
- DOA currently delegates contracting authority to entities, in good standing, up to \$200,000
- All contracting above \$200,000 must come through DOA



# STATE PROCUREMENT STRUCTURE

**DOA**

**State Procurement Division**

**Statewide Contracting**

**Procurement Support**

**Procurement Operations**

**Complex  
Procurements**

**Strategic  
Sourcing**

**Special  
Projects**

**Contract  
Tracking &  
Advising**

**Policy  
Management**

**Training &  
Certification**

**Delegation  
Management**

**Systems  
Support**

**Agency  
Compliance  
Reviews**



# ROLES & RESPONSIBILITIES

## DOA

- ✓ Ensure all entities comply with the Montana Procurement Act
- ✓ Issue policies and procedures for contracting
- ✓ Create statewide contract templates
- ✓ Conduct compliance reviews
- ✓ Lead all procurement actions above the current \$200K threshold
- ✓ Lead all sole source actions for the enterprise
- ✓ Issue and manage delegated agreements
- ✓ Provide technical assistance to agencies on all contracts and contracting actions
- ✓ Manage the statewide vendor system
- ✓ Oversee all evaluation committees, ensure fairness, transparency, and compliance with all laws
- ✓ Document retention
- ✓ Manage protests and litigation
- ✓ Statewide sourcing for enterprise contracts

## AGENCIES

- ✓ Comply with the Montana Procurement Act and the DOA Delegation Agreement
- ✓ Comply with all policies and procedures as required by DOA
- ✓ Participate in compliance reviews
- ✓ Purchase goods and services under \$200K in accordance with the procurement act
- ✓ Maintain records of all procurement actions
- ✓ Submit any contracting actions above \$200K to DOA for review and management through the procurement process
- ✓ Payment of all invoices to vendors
- ✓ Management of contracts and vendors, report any contract issues to DOA
- ✓ Submit any sole source requests to DOA for consideration
- ✓ Manage contract renewals in compliance with the law and DOA policies

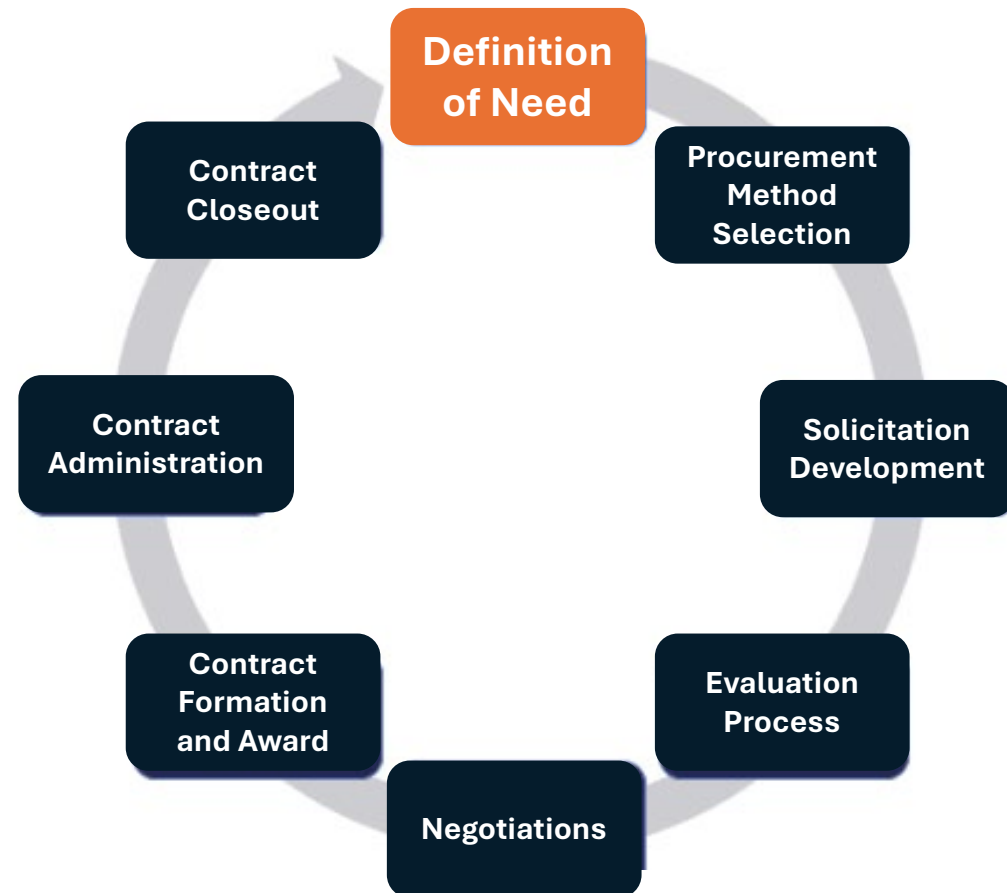


# PROCUREMENT CYCLE

**Before engaging in public procurement activities, it is important to understand:**

There are common characteristics between procurements, and that following each of the processes outlined here ensures procurements are conducted transparently and efficiently.

**THE STEPS OF THE PROCUREMENT CYCLE ARE GENERALLY IDENTIFIED AS:**



# PROCUREMENT METHODS / TERMS DEFINED

## **Request for Proposal (RFP)**

Process that awards to highest scoring offeror determined by an evaluation committee

## **Invitation For Bid (IFB)**

Process that awards to lowest cost bid that meets requirements

## **Qualified Vendor List from RFP (QVL)**

Process that awards to highest scoring offeror(s) resulting in multiple awards.

## **Request for Information (RFI)**

Used by the State to gather information from potential suppliers about their products or services for use in a formal solicitation.

**NO CONTRACT MAY BE AWARDED FROM AN RFI**

## **Exemption**

A legal or regulatory exception that allows an agency to bypass standard competitive bidding and procurement processes when purchasing goods or services.

## **Cooperative Purchasing**

A procurement conducted by or on behalf of more than one public procurement unit.

## **Sole Source / Sole Brand**

A procurement method from a single supplier as the only source available, only one source is acceptable or suitable, or the service or supply item must be compatible with current supplies or services. The sole brand is used when a product is only available from one manufacturer, even though it can be purchased through multiple vendors.

## **Exigency / Emergency Procurement**

A purchase made without following normal purchasing procedures due to a sudden and unexpected happening or unforeseen occurrence or condition requiring immediate action.

## **Limited Solicitation**

The limited solicitation procedure is used for supplies or services with a total contract value of \$10,000 or more and less than \$100,000.

## **Strategic Sourcing**

The structured and collaborative process of critically analyzing an organization's spending patterns to better leverage its purchasing power, reduce costs, and improve overall performance.

## **Alternative Procurement Method**

A method of procurement in a manner not specifically described in law, but instead authorized by the department under 18-4-302, MCA.



# CONTRACT MANAGEMENT

## WHAT TO INCLUDE IN THE CONTRACT:

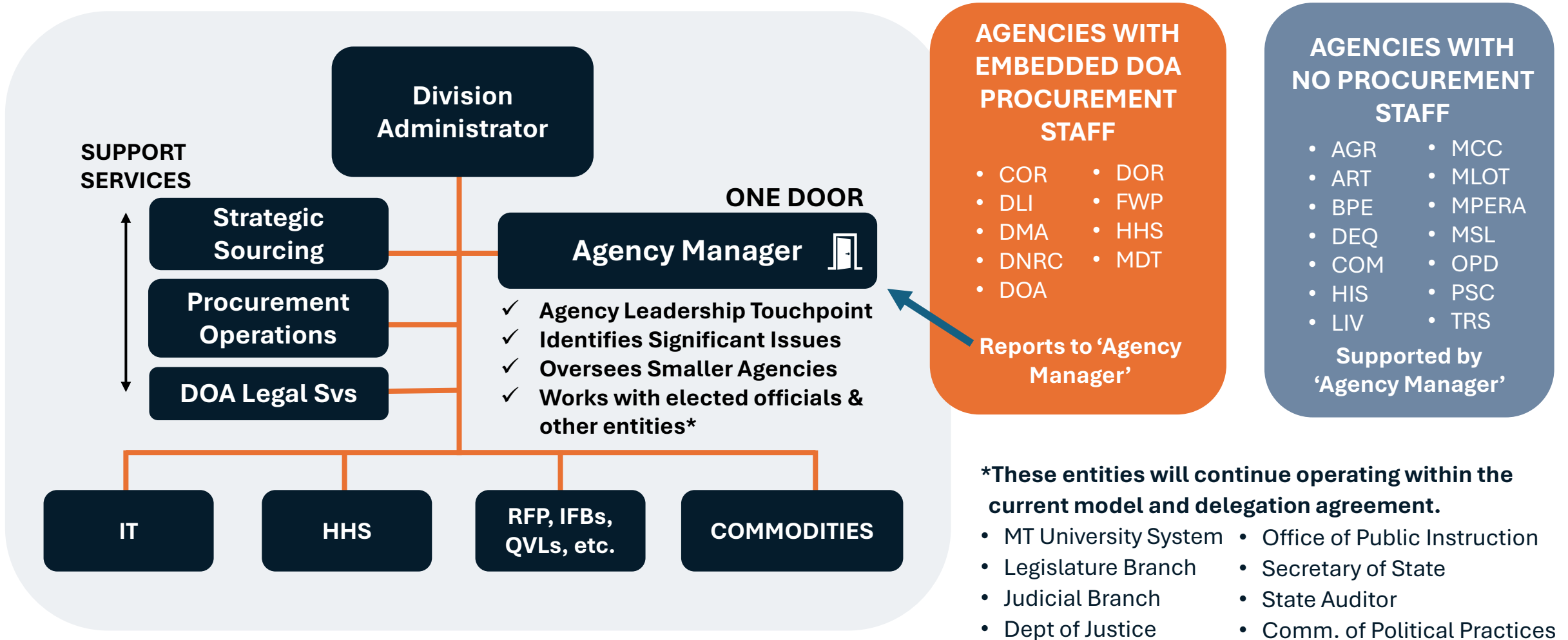
- Use Contract Liaison and Contract Manager language;
- Use the Meetings clauses in the contract – Technical/Contractual problems;
- Define performance in your contract (performance monitoring requirements) with the following functions:
  - Ensure required obligations in the contract are fulfilled;
  - Ensure acceptable levels of services or product quality levels are provided.

## CONTRACT MANAGEMENT DUTIES

- Knowing the contract (all requirement, terms and conditions)
- Inspecting and Approving/Rejecting work
- Determining and documenting modifications amendments
- Reviewing and approving invoices
- Approving subcontractors
- Providing notices
- Documenting milestones
- Documenting technical/contractual and progress meetings
- Documenting contract complaints, disputes, potential terminations
- **Is the State meeting its obligations?**
- Have progress meetings
- Completing contract close-out when appropriate
- Involving legal staff, when needed



# PROPOSED ORGANIZATIONAL STRUCTURE



# PROCUREMENT PROCESS FLOW

ONE  
DOOR

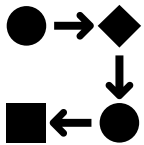


**PROCESS STARTS HERE**

Agency APO Approves  
& Initiates Request

**SERVICENOW WORKFLOW**

Agency Selects the Type  
of Solicitation



**DOA APPROVAL**

**IT – HANDLES ALL IT CONTRACTING**



**ITPR PROCESS & APPROVAL (SITSD)**

- RFPs, QVLs, POC, IFBs
- Software
- Licenses
- Cooperatives

**HHS – HANDLES ALL HHS CONTRACTING**

- RFPs, QVLs, IFBs
- Cooperatives
- IT Procurement – Routes to IT Flow

**RFPs ALL OTHER (Non-HHS or IT)**

- Handle all evaluations, scoring, etc.

**COMMODITIES**

**STRATEGIC SOURCING**

- Tracks and Plans for Future Strategic Buys
- Handles ALL Cooperative Buys

Partners with  
**STRATEGIC SOURCING**  
for Review & Approval

**PROCUREMENT  
PROCESS  
COMPLETE**

Solicitation  
Pre-Award Action

Agency APO, SITSD, Agency  
Legal - DOA Legal (as needed)

Notice Of Intent to  
Award (NOIA) Process

Contract  
Executed /  
Signed

Agency  
Implementation  
& Management



# NASPO & OTHER COOPERATIVE ENTITIES



## THINGS TO KEEP IN MIND

- ✓ Vendors must participate in a cooperative association like NASPO– vendors must pay to participate.
- ✓ State must have an agreement on file in that respective portfolio and master agreement to participate.
- ✓ States may PAY a fee to utilize a cooperative, usually a 1.5 - 5% mark-up.

## THE FOLLOWING INFORMATION IS USED TO DETERMINE OUR PARTICIPATION:

- ✓ Annual Agency Procurement Forecasting Plans
- ✓ Multi-Agency Need / Requests
- ✓ Replacement PAs
- ✓ Spend Analysis



# COOPERATIVES – INTENT TO PARTICIPATE

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## Requirements:

### Required by ARM 2.5.610 COOPERATIVE PURCHASING:

- (4) An agency may participate in a cooperative contract if the following conditions are met:
  - the division provided adequate public notice of the solicitation; and the contract or purchase order includes all statutorily required terms and conditions.
- **If this has not been completed, then we must provide notice by:**
  - “Providing notice of the intent to purchase from the cooperative contract and allowing interested vendors a reasonable time to submit a response to the notice.”





**Discussion & Questions?**