



utah
govops
UTAH DEPARTMENT OF GOVERNMENT OPERATIONS

Group Gathering – Initial Training

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Trainer
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Overview

- ▷ Agency Procurement Authority
- ▷ State Purchasing Procurement Authority
- ▷ Make the Call – Events \$10,000 or less
- ▷ Send for Review – Events over \$10,000
- ▷ Guidance (& Guidance Handout)



Agency Procurement Authority



AGENCY SPENDING LIMIT

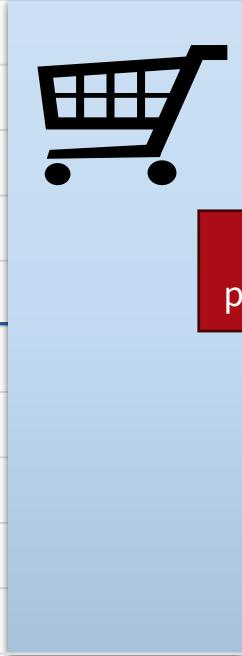
THRESHOLDS

\$10,000

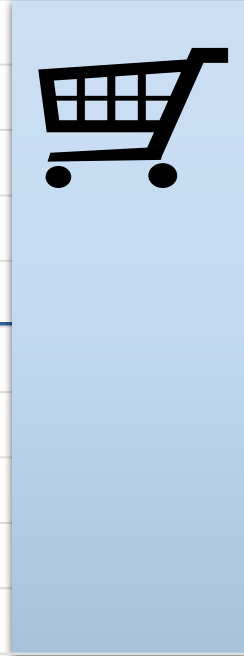
\$5,000



Individual Item



Individual Item



Standard Small Purchase - No quotes

Quotes for Small Purchase

State Purchasing's Procurement Responsibility

- ▷ Any procurement that
 - does not already have a solicited contract or PO, **AND**
 - exceeds \$10,000

- ▷ **OR**
 - is \$10,000 or less, **AND**
 - a standard small purchase or a quote cannot be used



State Purchasing Responsibilities

Group Gathering



State Purchasing's Responsibility - Group Gathering

**Ensure procurement
follows Code & Rule**



State Purchasing's Responsibility - Group Gathering

**Will not be monitoring
compliance with the policy**



Group Gathering – Section B, #2- 3

B – Event expenses must follow purchasing rules

- 2 – If the cost of the event will be **between \$5,000.01- \$10,000, agencies may need to secure quotes** from vendors. . . .
- 3 – If the total cost of an event will be **over \$10,000, agencies must contact the GovOps Division of Purchasing. [aka State Purchasing]**



Group Gathering – Section B, #4

B – Event expenses must follow purchasing rules

4 – Agencies must comply with Utah Code 63G-6a-24 and Utah Code 67-16 **when a vendor offers free meals, rooms, hotel points, or gifts.** These laws help make sure that such offers do not result in real or perceived favorable treatment of the vendor or special benefits to an employee.



Group Gathering – Section B, #5

B – Event expenses must follow purchasing rules

5 – If a group gathering expense **requires a payment before the event**, agencies must follow the rules for prepayment listed in Utah Code 63G-6a-1208. For questions, contact the GovOps Division of Purchasing.

Pre-Payment Form –
Signatures Required



State Purchasing's Responsibility -

5. Bullet Pt 8

- documentation from the GovOps Division of Purchasing if the event costs over \$10,000 or documentation from an agency's independent procurement authority.



Make the Call

Events \$10,000 or less



Get Approval First

- ▷ Submit BEFORE you sign any document
- ▷ Submit BEFORE you are ready for the event



FI-58 Form, Page 4 - Total Cost of Event

Total cost of event

Expense category	Subtotal
Food	\$0.00
Tips and fees	\$0.00
Venue	\$0.00
Lodging	\$0.00
Presenter	\$0.00
Other	\$0.00
Event total	\$0.00

If your event will cost over \$10,000, contact the [GovOps Division of Purchasing](#).



Remember this?

B – Event expenses must follow purchasing rules

2 – If the cost of the event will be **between \$5,000.01-\$10,000, agencies may need to secure quotes** from vendors. . . .



AGENCY SPENDING LIMIT

THRESHOLDS



Total cost of event

Expense category

Food

Tips and fees

Venue

Lodging

Presenter

Other

Event total - \$3,200.00

Total cost of event

Expense category	Subtotal
Food	\$1,700.00
Tips and fees	\$0.00
Venue	\$0.00
Lodging	\$0.00
Presenter	\$1,500.00
Other	\$0.00
Event total	\$3,200.00

If your event will cost over \$10,000, contact the [GovOps Division of Purchasing](#).

Event Total – \$5,800.00

Total cost of event

Expense category	Subtotal
Food	\$3,300.00
Tips and fees	\$0.00
Venue	\$0.00
Lodging	\$0.00
Presenter	\$2,500.00
Other	\$0.00
Event total	\$5,800.00

If your event will cost over \$10,000, contact the [GovOps Division of Purchasing](#).

Event Total – \$6,800

Total cost of event

Expense category	Subtotal
Food	\$3,300.00
Tips and fees	\$0.00
Venue	\$3,500.00
Lodging	\$0.00
Presenter	\$0.00
Other	\$0.00
Event total	\$6,800.00

If your event will cost over \$10,000, contact the [GovOps Division of Purchasing](#).



Event Total Same BUT Must Use Venue to Cater

Total cost of eve

Expense category	Subtotal
Food	\$3,300.00
Tips and fees	\$0.00
Venue	\$3,500.00
Lodging	\$0.00
Presenter	\$0.00
Other	\$0.00
Event total	\$6,800.00

If your event will cost
[GovOps Division of Pu](#)

Great Events Venue

Invoice

Venue		\$3,500
(includes AV, set-up, etc)		
Lunch	165 @ \$20	\$3,300

Total		\$6,800

Event Total - \$9,500

Total cost of event

Expense category	Subtotal
Food	\$4,000.00
Tips and fees	\$0.00
Venue	\$0.00
Lodging	\$0.00
Presenter	\$5,500.00
Other	\$0.00
Event total	\$9,500.00

If your event will cost over \$10,000, contact the [GovOps Division of Purchasing](#).

Help is Available

- ▷ The Purchasing team is always available for questions
- ▷ purchasing.utah.gov/contact-us/

Purchasing

Address: 4315 S 2700 W FL3, Taylorsville, UT 84129

Phone: [801-957-7160](tel:801-957-7160)

Hours: 8am - 5pm MT, M-F

[View Purchasing Staff Directory](#) 

[View Pod Assignments](#) 



Pod Assignments

Utah Division of Purchasing Staff with Pod Assignments*

4315 S 2700 W, FL 3, Taylorsville, UT 84129

Elected Officials

Attorney General's Office

Utah State Auditor

Governor's Office of Energy Development

Governor's Office

Governor's Office of Economic Opportunity

Navajo Trust Administration

Lt. Governor's Office

State Treasurer

Governing

Department of Commerce

Department of Alcoholic Beverage Services

Department of Financial Institutions

Department of Culture and Community Engagement

Department of Insurance

Labor Commission

Public Service Commission

Tax Commission

POD Members	Email	Phone
Glenna Nelson	gnelson@utah.gov	801-957-7157
Charm Siddoway	csiddoway@utah.gov	801-957-7119
Tiffany Rydalch	trydalch@utah.gov	801-957-7129

POD Members	Email	Phone
Laurel Delagerheim	ldelagerheim@utah.gov	801-957-7121
Charm Siddoway	csiddoway@utah.gov	801-957-7119
Jennifer Knowles	jknowles@utah.gov	801-957-7122

Documentation

- ▷ All the documentation Jenifer discussed
- ▷ Store according to Finance Policy



Send for Review

Events over \$10,000



Timely Submission for over \$10,000

- ▷ Get approval on FI-58 first
- ▷ Submit BEFORE you sign any document
- ▷ Submit BEFORE you are ready for the event



Submission Process for Ease of Memory!

- ▷ Create an RQS in Vantage
- ▷ Email the group gathering documents to purchasingsolicitations@utah.gov
- ▷ Email subject – Full RQS # (ie – RQS 150 2600001212)



Four Possible Outcomes

Solicitation Process	Documented Response
1. Small Purchase Only	Email to move forward
2. Quotes by Agency Required	Email to move forward by obtaining quotes
3. Quotes required by Division	The Division will work with agency to obtain quotes. Outcome of PO or P-card
4. Formal Solicitation Required	The Division will work agency on the solicitation. Outcome likely to be at least one PO.

Documentation from Purchasing

- ▷ Email Response – include with p-card payment
- ▷ PO/Contract – standard documentation
- ▷ Plus, all documentation required by Group Gathering Policy





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Thank You

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