

# Ordinance Update

09 February 2022

Changes to County Procurement Practices

Added Process Section for Meeting Federal Grant Requirements

# County Procurement Process Modifications



## Micro-Procurements

- Was \$1,500, 1 quote
- Is \$2,500, 1 quote, reasonable assessment of pricing required\*
- >\$2,500, 3 quotes and award to the lowest priced quoting organization that can perform the work is required
- Purchase Requisition flow unchanged

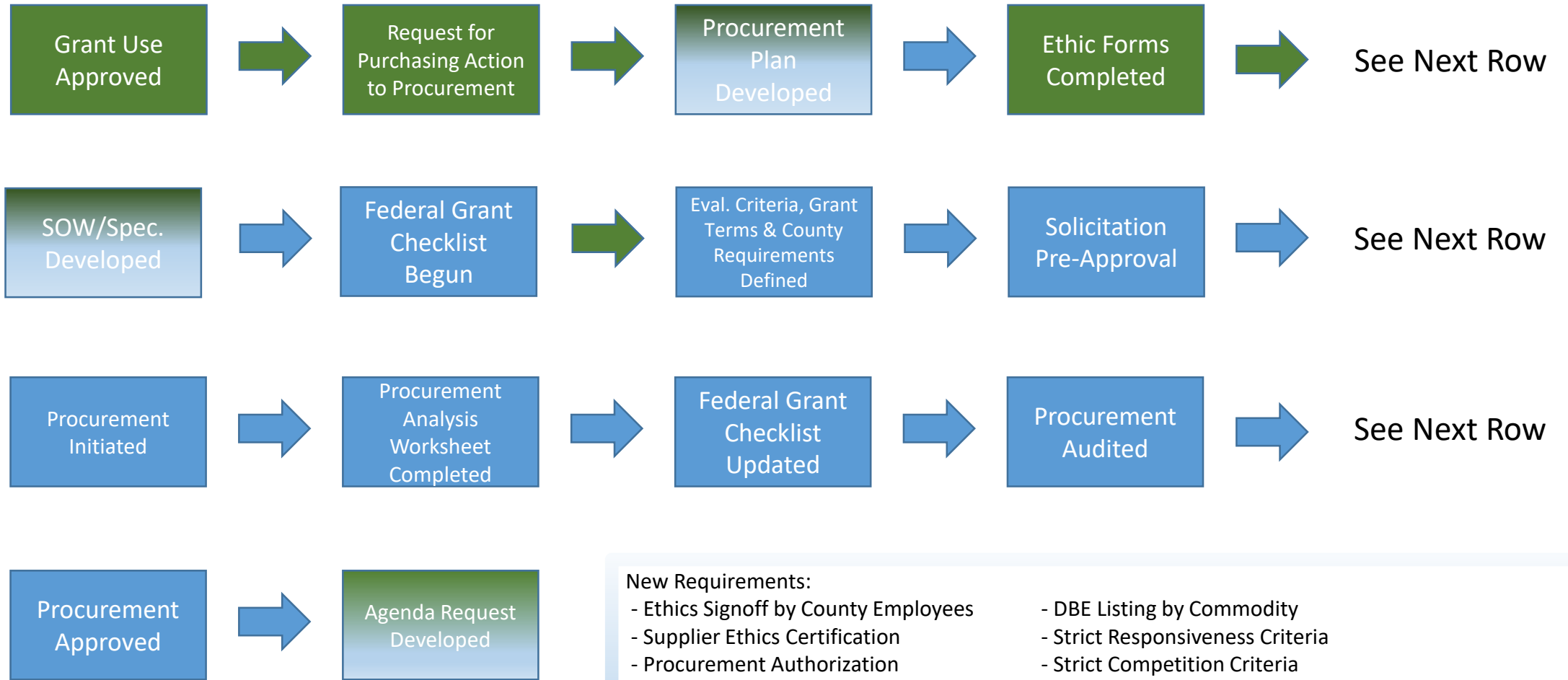


## Large Procurement

- Threshold Change:
  - Was Over \$25,000
  - Is Over \$100,000
- Agency may obtain quotes on simple competitive goods and services\*
- Procurement Department will continue to manage proposals, engineering services, construction over \$25,000.
- BOC Still Approves actions >\$25,000

\* The Procurement Department will conduct training on these changes by the end of February.

# Federal Grants Procurement Process



Green = Agency has primary responsibility  
 Blue = Procurement has primary responsibility

- New Requirements:**
- Ethics Signoff by County Employees
  - Supplier Ethics Certification
  - Procurement Authorization
  - Procurement Plan
  - Grant Terms & Conditions
  - Formal Procurement Analysis
  - Finance Confirms Funding Source
  - Target Price
  - DBE Listing by Commodity
  - Strict Responsiveness Criteria
  - Strict Competition Criteria
  - Statement of Financial Viability
  - Suppliers Solicited Listing
  - Supplier Performance Management - Agency Responsible
  - Negotiation Memorandum
  - More Formal Approvals Documentation

# County Requirements Vs Federal Grants

## Process Step

## County Requirement

## Grant Requirement

### Procurement Authorization

### Informal

### Formal – Purchase Request Form (A)

#### Procurement Planning

- Expected Cost
- Solicitation Method/ Contract Type
- SOW/Specification Development
- Evaluation Criteria
- Current Source Advantages

Informal Estimate  
 Informal Discussion  
 Joint Development  
 Joint Development  
 Informal Discussion

Formal – Target Cost Needed  
 Procurement Planning Form (P)  
 Joint Development/Evaluated Against Grant Requirements (P)  
 Joint Development/Evaluated Against Grant Requirements (P)  
 Evaluated Against Grant Requirements (P)

#### Ethics

- **Participating County Employees**
- Participating Suppliers

### Assumed

Assumed (& Non-Collusion)

### Certify Meeting HR Policy Section 7 & Procurement Policy PUR-02 (A)

Certify Meeting Supplier Ethics on Procurement Page (P)

#### Terms and Conditions

Standard & Situational

Add Government Required List of Terms (P)

#### Award Criteria

- Responsive
- Responsible
- Financially Capable
- SAMS Registered Supplier

Some Flexibility  
 Some Flexibility  
 Less Formal  
 Informally Use SAMS

No Flexibility – All Criteria Met, All Forms Complete  
 No Flexibility – All Criteria Met  
 Must State Why Capable (P)  
 SAMS – Must Be Listed as Acceptable (P)

# Federal Grant Impact On Procurement Process

The Agency initiates the process by completing the Purchase Request Form and the Ethics Awareness Form.

Procurement has a 48 item checklist, two new forms and new terms and conditions to work through based on the grant requirements for spending funds with third parties.

This process will take more time than the County process.

Process and Grant Procurement Training is being developed.