



Proposed Revisions to the County Purchasing and Contracting Policy Manual

Presented to:
Board of Supervisors
November 14, 2017

Item # 15
File 17-810



PROCUREMENT AUTHORITY

California Government Code gives authority to the Board of Supervisors to establish rules and regulations for procurement, which is accomplished through Chapter 22 of the Solano County Code and the County Purchasing and Contracting Policy Manual. These documents:

- Define policy and procedures for procurement of County services and supplies
- Ensure open, fair, and competitive access to County business opportunities
- Foster public confidence in the integrity of the County procurement process
- Encourage and promotes local vendor participation
- Enhance economy of scale procurement

Who is Authorized to Commit County Funds

- County Board of Supervisors, County Administrator/Purchasing Agent, and Department Heads as authorized by law and applicable policies



PURCHASING AND CONTRACTING POLICY MANUAL

- **Last comprehensive update in July 2004**
- **BOS authorized policy changes since 2004**
 - 2006 - CAO authority to conduct bid protest hearings
 - 2008 - Equipment leases increased from 36 to 60 months
 - 2009 - Added Local Vendor Preference Policy
 - 2011 - Added Environmentally Preferable Purchasing Policy
 - 2013 - Added Uniform Public Construction Cost Accounting



INSTITUTE FOR PUBLIC PROCUREMENT PURCHASING ASSESSMENT

Board of Supervisors authorized comprehensive review of County purchasing policies and practices using the Institute for Public Procurement.

The Institute is a membership-based non-profit organization providing support to public sector organizations and procurement professionals. The purchasing assessment and recommendations for improvement include:

- **Update the Purchasing and Contracting Manual**
- **Increase Purchasing Authority Thresholds**
- **Continue Transition from Paper to Electronic Procurement Including Requisitions, Bidding, and Payment Processing**



PURCHASING AND CONTRACTING POLICY MANUAL REVISIONS

- 1. Modifications to comply with legal requirements and Board policies including the Uniform Construction Cost Accounting Act (Sections 1.4.4 and 1.10.0)**
- 2. Added language for solicitation requirements for grant funded services or commodities (Section 1.1.15)**
- 3. Modifications to remove references to paper processes and add electronic/automated processes, including electronic bidding (Section 1.2.0)**
- 4. Added language to support performance-based contracting (Sections 1.7.2 and 1.8.12)**
- 5. Increased purchasing authority thresholds (Sections 1.1.6, 1.1.9, and 1.4.6)**



RECOMMENDED CHANGES FOR PURCHASING AUTHORITY

WHAT	CURRENT THRESHOLD	PROPOSED THRESHOLD	PROCUREMENT METHOD	TOOL FOR EXPENDITURE	APPROVING AUTHORITY	POLICY SECTION
Commodities/Goods	<\$5,000	<\$7,500	Informal Quote	Departmental Purchase Order/Vendor Claim	Department Head	1.1.6, 1.1.9, & 1.4.7
Commodities/Goods	>\$5,000 - \$25,000	>\$7,500 - \$50,000	Informal OR Formal Quote	Purchase Order	CAO/Delegated Authority	1.1.6, 1.1.9 & 1.4.7
Commodities/Goods	>\$25,000	>\$50,000	Formal Invitation to Bid	Purchase Order	CAO/Delegated Authority	1.1.6, 1.1.9, & 1.4.7
Professional Services	<\$5,000	<\$7,500	Simple Services Contract	Contract	Department Head	1.7.0
Professional Services	>\$5,000 <\$50,000	>\$7,500 <\$50,000	Informal OR Formal Quote	Standard Contract	County Administrator	1.7.0
Professional Services	>\$25,000	>\$50,000	Formal Request for Proposals	Standard Contract	County Administrator (Contracts <\$75,000) County Board of Supervisors (Contracts >\$75,000)	1.7.0 & 1.8.0



RECOMMENDED BOARD ACTIONS

- **Consider and approve proposed revisions to the County Purchasing and Contracting Policy Manual**
- **Authorize the County Administrator to approve technical changes as necessary**