

# Purchasing 101 Training



# Mission & Value Commitments

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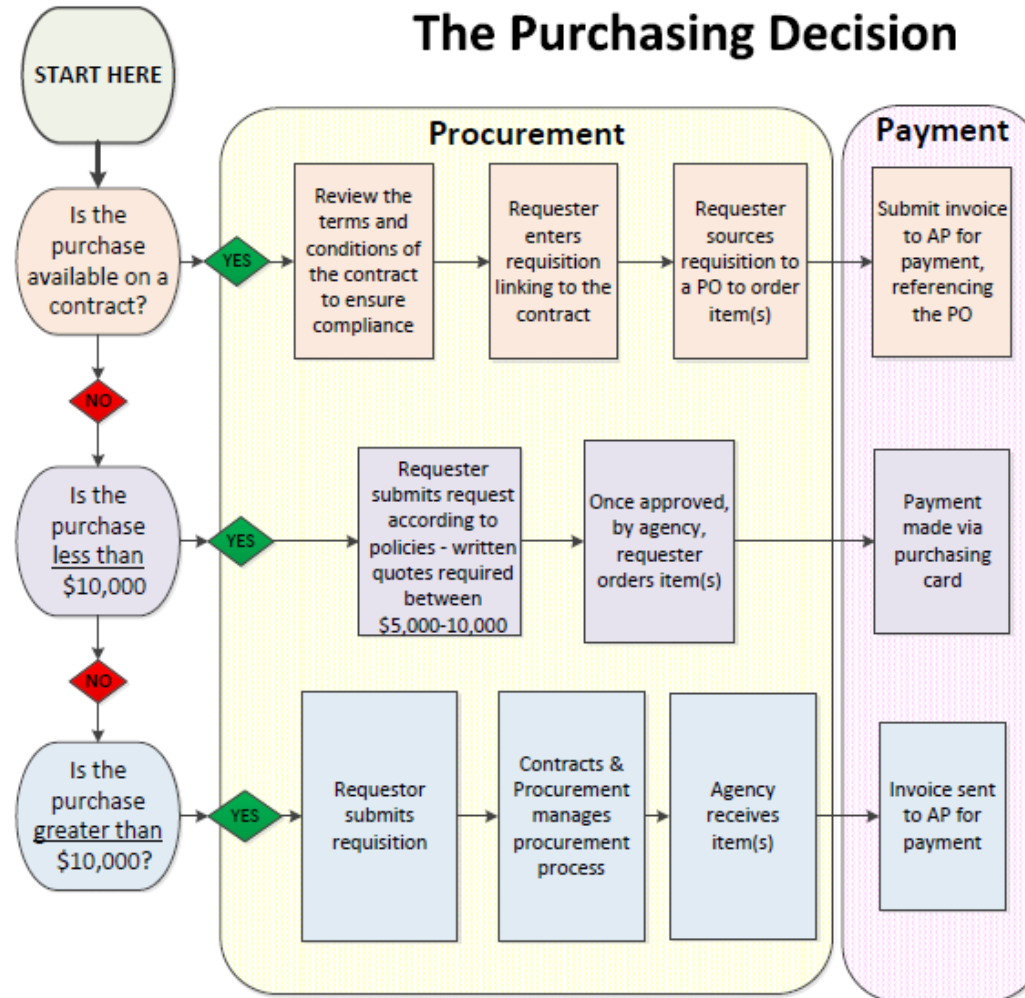
- The mission of C&P is to provide professional, efficient purchasing services and promote fair and open competition to attain the best value for the County.
- Vision/Values:
  - 1. Be proactive in our communications
  - 2. Be a valued partner to county agencies
  - 3. Find solutions
  - 4. Be adaptable



### Policies

- Small Cost Purchases**
  - Purchases less than \$10,000
  - Quotes required between \$5,000-10,000 (encouraged below that)
  - See Policy 7021*
- Purchasing Cards**
  - Less than \$10,000 per transaction
  - No sales tax
  - No use by anyone except cardholder
  - See Policy 7035*
- State / Cooperative Agreements**
  - Follow requirements of state or cooperative contract
  - See Policy 7020*
- Purchases to be Conducted by Contracts & Procurement**
  - All procurement over \$10,000 without contract
  - Expedited RFP (under \$50,000)
  - Full RFP
  - Sole Source/Exemptions
  - Policy 7010, 7030*

## The Purchasing Decision



Revised September 2020

[Link](#) to Purchasing Decision Chart

# Purchasing Policies & Ordinances Overview

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## Policies:

- [7010](#) Procurement
- [7020](#) State Contracts and Cooperative Agreements
- [7021](#) Small Cost Purchasing Procedures
- [7030](#) Request for Proposals (RFP)
- [7035](#) Purchasing Cards Authorization and Use

## Ordinances:

- [3.20](#) Purchasing Procedures
- [3.28](#) Contract Processing

# Ordinance 3.20 – Purchasing Procedures Highlights

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1. All procurements shall be competitive unless an exception applies (3.20.020.A)
  - A. Exceptions include (not a complete list): small cost, under \$10,000 (quotes encouraged \$5,000 and under; required between \$5,000.01-\$10,000); exigency; sole source; legal services and notices; utilities; non-software subscriptions; media advertising; goods & supplies for authorized resale; dues and membership fees; speech, lecture, specialized training or performance (3.20.030 A.4, 5, & 6)
2. Sole source must be approved by Purchasing Agent, Jason Yocom (3.20.030.A.5)
  - A. If there is reasonable doubt, competition shall be solicited
  - B. Sole source procurements over formal bid limit, \$50K, must be advertised for at least 7 days – any responses will be considered before moving forward with the sole source procurement
  - C. Examples of sole source circumstances:
    - i. Standardization or compatibility of equipment, materials, technology, software, accessories, replacement parts, or service
    - ii. Transitional costs are unreasonable or cost prohibitive
    - iii. Item is needed for trial use or testing

# Policy 7010 – Procurement Highlights

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1. The purpose is to invite maximum competition practicable (1.1)
2. Bids are out for a minimum of 10 calendar days (3.0)
  - A. Bids, RFB/RFC, are awarded to the lowest responsible/responsive bidder(13.0)
3. Sole source needs justification – why is this vendor the only source? (16.1)
4. When is a contract beneficial? Two conditions to consider (17.2):
  - A. Dollar volume should exceed \$50,000
  - B. Frequency of purchases should exceed 20 per year

[LINK](#) to Instructions for Solicitation & Specification Development

[LINK](#) to RFB/RFC Development Worksheet

# Policy 7030 – Request for Proposals (RFP) Highlights

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1. RFPs are typically used for professional services, consulting services, and complex technology services and equipment (1.0)
2. RFPs are used when low bid isn't going to be the most advantageous, and other factors should be considered in an award (2.1)
3. Minimum advertising time is 20 days from issue (4.1.2)
4. Expedited RFPs are quicker (advertised for 5 days), but must stay under the formal bid limit (\$50,000) for the life of the contract (13.0)

[Link](#) to Agency-Buyer Liaison

[Link](#) to Pre-Solicitation Considerations Sheet for RFPs

[Link](#) to RFP Development Worksheet

# Policy 7021 – Small Cost Purchasing Procedures Highlights

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1. Purchases made below the small cost limit (\$10,000) do not require formal bids (1.1.1)
2. Purchases made between \$5,000.01-\$10,000 require agency to get at least 3 quotes and maintain the file for that procurement (where a sole source or other exception applies, agency writes and keeps justification, signed by management, in its file)
3. Purchases \$5,000.01-\$50,000 can be made by soliciting 3 written quotes and award goes to the low quote – Purchases over \$10,000, the quotes come through Contracts & Procurement (1.1.2)
  - A. Getting an apples to apples comparison is key
4. Invoices shall not be split into multiple invoices for a single transaction (2.2)

[Link](#) to find quotes template to help in gathering quotes



# Policy 7035 – Purchasing Cards Authorization & Use Highlights

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1. Cardholder is solely responsible for use of the p-card (1.2)
2. Training materials are incorporated into the policy (1.8)
3. Used to make small cost purchases, utility payments, and other purchases authorized by the Purchasing Agent (3.5)
4. No sales tax, personal purchases, split purchases, or purchases made by anyone other than the cardholder (4.0)
- 5 . Capital purchases, 3<sup>rd</sup> Party Payment Processors, purchase deliveries to non-county operated/owned addresses and alcohol purchases must obtain additional approval from Division, Department and/or the Purchasing Agent (5.0)

# Ordinance 3.28 – Contract Processing and Payments Highlights

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Typical contract process: 1. Go through procurement, or exemption from, 2. Have your attorney approve the contract to form, 3. Have the Vendor sign, 4. Send contract to C&P for processing, 5. Return fully executed contract to Vendor

1. C&P to ensure contracts (and amendments) are approved to form by DA's Office, authorized by the director of the agency, enter the contract in the financial system, and submit to the proper signing authority for execution (3.28.020.B&C)
2. C&P to act as a repository for all county contracts (3.28.020.A)
3. Payment requests are submitted to Mayor's Finance, if payment against a contract, the contract number must be referenced (3.28.130.A)

## Speaking of Contracts...

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- Reminder: per ordinance (3.16.050), **only** the Mayor or a Designee who has been authorized can execute, or sign, a contract. Any violation of this could “result in the personal obligation and liability of the person at fault for such violations.”



# Policy 7020 – State Contracts & Cooperative Agreements

## Highlights

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1. A master agreement will be used to make repetitive purchases (1.1)
  - A. To request a State Contract be set up as a Master Agreement, contact C&P
2. County agencies must fulfill the requirements of any state or cooperative contract (1.4.1)
3. Sometimes it's in the best interest of the County to **NOT** use a cooperative contract and to go out to bid on our own (1.5)
  - A. Can the County get a lower price by going out to bid? What is the volume of products being purchased?

# Other Resources

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- [Purchasing Resource Guide](#)
- [MyFIN eProcurement Troubleshooting Guide](#)
- [Search County Contracts \(SharePoint\)](#)
- [RFP Flowchart](#)
- [RFB/RFC Flowchart](#)
- [Construction Flowchart](#)
- [Surplus Information](#)
- [PCard Information](#)
- [Project Tracking](#)
- [State Contract Search](#)

# Four C's For Success

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- C = Competition – most competition as possible
- C = Contracts - **don't** sign them, only the Mayor or one of her Designees can execute a contract (process through C&P)
- C = Check Yo' Contracts – manage your contractors and make sure you're buying items/services at or below contracted rates
- C = CONTACT US – C&P is here to help; we want to be your valued partner

# Partner With Us

## Contracts & Procurement Team

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