

Procurement Newsletter

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P-card Portal Updates

Some new and helpful updates have been made to the P-card Portal that will make reconciling p-cards easier:

- On the P-card Portal menu, there are two new options, “Change Log” and “Docs”. The Change Log gives a brief description of changes that have been made to the Portal. Docs will take you to the basic instructions for using the Portal.
- A major change that was made is the addition of the “Merge” button. This will allow reconcilers to combine p-card transactions into a single transaction that will better match the PO (requisition). For example, if a \$12 purchase is made, and then a \$2 refund is made to the card, the PO will be for \$10. To match this up in the Portal, you can merge the \$2 refund into the \$12 transaction in the portal so that it totals \$10, and you can then link it to the requisition. Detailed instructions are found in the Portal Instructions.
- Enhanced sort and search options have been added. Transactions can now be found by:
 - Status
 - Date
 - Trans Amount
 - Linked Amount
 - Description
 - Merchant
 - PO number
- There have also been some enhancements made to make the Portal easier to navigate.

Note that several of these enhancements were a direct result of feedback received from many of you. Please feel free to let us know of any issues you may be having or of ideas on making the Portal easier to use.



Purchasing Big Ticket Items

Two processes must be considered for big ticket items: Competition and Contracts.

Competition

Purchases over \$5,000 require at least three competitive bids unless it is being purchased under an existing contract.

The first thing to ask is whether the item can be found on an existing County, State, or Cooperative contract? Procurement can help you search. The earlier you involve Procurement, the better. Sometimes we can find lower cost or better options than you realize are possible.

If there is no existing contract, you can obtain quotes by reaching out to vendors directly or by listing the item on GovSpend. GovSpend will save you the trouble of researching potential vendors; they will come to you! It's important to make sure that the item description is accurate and that any conditions that apply are spelled out clearly (such as when the item is required, delivery instructions, etc.). We can help you get set up with GovSpend.

If the purchase is over \$50,000, a sealed bid process is required. You will need to work with Procurement to issue a solicitation via the State website (SciQuest). This process can take anywhere from three weeks for a simple Invitation to Bid to 2-3 months for a complex RFP.

Contracts

Purchases of services or construction over \$5,000 will require a contract. This can be either a County agreement, a State contract, or a Cooperative contract (subject to review by Procurement).

The purchase of goods over \$10,000 also requires a contract.

You should work with Procurement and your portfolio attorney as early as possible to get the wheels turning on a contract. All contracts need to be put on the Commission agenda for approval and signature.

In rare instances, a contract is not possible or desirable. In these cases, we can pursue granting an exemption, which will require the approval of Procurement, the Attorney's Office, and the Commission.

Quality in Government Procurement

Marci Woodward, State Procurement Manager

Some government employees are under the mistaken impression that:

1. Government must purchase the cheapest, lowest quality items.
2. Their department is not allowed to spend a little more money to get a higher quality product.
3. Their department must keep purchases under a pre-determined dollar threshold and therefore must limit the goods and services they purchase in a single purchase.

These are inaccurate misconceptions that must be dispelled. It is the duty of government procurement professionals to help government workers get the high-quality goods and services they need, in the needed quantities, within the constraints of the Agency's budget and through the most appropriate purchasing procedure.

Multiple possible purchasing procedures are authorized under your Procurement Rules and Regulations so that agencies have dynamic options and can choose the best procurement procedure based on the procurement project. All the different procurement procedure options have their own unique pros and cons.

Non-purchasing or non-financial government employees are not expected to know all the different procurement options and when to use them. These employees just need to know the name and contact information of their designated procurement professional(s). One of their first steps in their purchase process is to contact your procurement professional and discuss the procurement need. The procurement professional can then guide them to the best procurement procedure for their situation.

The procurement process runs smoothest when there is transparent collaboration between the government employee seeking to make the purchase, their Agency's designated government procurement professional(s), and the procurement oversight entity applicable to their agency.

Intentionally trying to circumvent purchasing procedure is prohibited by law. Unintentionally picking the wrong procedure causes problems and delays. Everyone involved in the procurement process is more efficient when an appropriate amount of time is spent on the front end to ensure the desired quality level and prevent problems on the back end.

- It takes exponentially more time and resources to submit a sole source request, have it contested by the vendor community, and then have to cancel and re-release a "request for proposals" (RFP) than it takes just pursuing the RFP option right from the start. Sometimes, the added delay in the timing of the purchase even makes the purchase price go up. This is especially true under the current economic conditions.
- It's a lot easier to contract for a high-quality product through a procurement process that identifies and eliminates low-quality products (such as a RFP) than it is to decide what to do with a contract for a low-quality product that doesn't adequately meet the Agency's needs.

- It's a lot easier to release a procurement with a good scope of work than to negotiate a scope of work change with the vendor once the contract is already established.

An important part of the procurement process is the procurement professional asking the right questions, gathering the correct information from the Agency's subject matter expert (SME), and taking a small amount of time to really understand the procurement need(s). Once these things are done, the procurement professional can release a well-designed, concise solicitation that is easy for the vendor community to understand.

For more information on the multiple possible purchasing procedures contact your Procurement Professionals.

PO Entry Group

Procurement uses a group E-mail titled PO Entry group. We use this to communicate information to those who have security access in the Purchase Order process.

If you are not seeing the emails, scroll down in Outlook until you find Groups. PO Entry will be listed – if you are part of the group. If you know of someone who should be part of the group but is not receiving the emails, let Procurement know.



Furniture Orders

Public Works is responsible for county buildings. Including furniture. Furniture is defined as tables, chairs, desks, etc.

This is why all furniture orders need to go through PW before the order is placed. This is to ensure that good quality furniture is obtained and includes moving, assembling, installing or if the furniture attaches to the building,

Once you have contacted Procurement and PW for recommendations on furniture, you will be instructed to create a Purchase Order to Utah County Treasurer. Once the PO is approved, let PW know the PO# and they will place the order with the vendor. Once the furniture and an invoice from the vendor have been received, PW will create an invoice for your Treasurer PO to process payment.

There are rare times PW will instruct you to purchase directly from the vendor, but PW still needs to review the PO before the order is placed.