

PURCHASING STUFF



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This is a busy time of year for purchasing. In this edition of **Purchasing Stuff**, we will address a few of the issues that commonly arise with the turnover of the fiscal year. Feel free to let us know if there are topics of interest you would like to see in future editions.

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Special Approvals



There are a few items that need extra approvals up front before the order is placed, even when a P-card is used. Under the Procurement Rules and Regs, Section 2-104:

All purchases of computers or computer-related equipment require approval from the IT Department Head or his designee as to type and compatibility with the County information systems. Software also requires IT prior approval. Keep this in mind as you plan for your purchases. Peripherals (mouse, keyboard, etc.) do not require IT approval.

All purchases of furniture and telecommunications equipment or telecommunications-related equipment require approval from the Public Works Department Head or his designee as to type and compatibility with County structures and/or systems.

These approvals are obtained in the Finance system as part of the PO approval process.

***“Opportunity
arises for the
prepared
mind.”
– Louis Pasteur***



Utah county has signed an MOU with the State to be part of their Amazon Prime program.

What it means to you:

- When we make the switchover, there will be a few days you will not be able to order from Amazon. Your email will be disconnected from the current Amazon account and you will receive a new invite to join the Prime program under the State.
- All items on the Amazon contract are considered to be on State contract. Competitive bids are not required. In some cases competitive quotes may still be desirable, however.
- There are some limits set by the State.
 1. Furniture, computers and computer related items cannot be ordered from Amazon.
 2. Some other items will be restricted if they are found cheaper on other state contracts — think office supplies. If they are restricted/blocked, check Office Depot or Staples.
 3. Not all vendors will honor the tax-exempt status of Government. The State has programmed a warning to pop up if the vendor will charge sales tax. At that point you are to leave that vendor and find the product with a different provider. If you proceed you are responsible for the taxes.
 4. All purchases will be paid by P-card. Direct invoicing will no longer be an option. Remember to follow the P-card policy when using your department's credit card.

Blanket P.O.s



With the new year just around the corner, many of you will be establishing new purchase orders to accommodate 2020 purchases. Blanket POs are a great way to streamline the process. Advantages to blanket POs include:

- Approval is needed only once for all purchases for the year.
- New POs don't need to be established every time an invoice is paid.
- Vendors don't need to work with multiple POs throughout the year.

Blanket POs should be used for recurring, predictable costs. The PO description should include as many details as possible so that the one-time approval can cover all the costs. Information should include specific details about what is being purchased, rates charged, serial numbers of machines (for maintenance contracts), etc.

Blanket POs should not be used for purchases of supplies and equipment where the items can vary from purchase to purchase. The repeated purchase of a specific item with a specific set price, however, can be set up with a blanket PO. Give us a call if you have a question about whether or not a blanket PO is appropriate.

Travel Request Tips

When you are ready to book rooms for a trip, please keep in mind Section D of the Utah County Government Travel Policy.

Within the travel module, several travel links have been added to help you in your search. Click on the Travel Web Sites tab. (See screen shot below)

As you research different booking options, be careful of 3rd party fees. They come in many forms. Make sure you review their terms and conditions. Some charge you a service fee or convenience fee for having them book the service for you.

It is best practice to use reputable websites, like those on the Travel Web Sites tab within travel. On this tab there is an option to use State Travel to make your arrangements. Understand that they charge a \$26 fee because it is a refundable option if plans change.

For travel, anything charged to a travel card is the responsibility of the employee who charged it. Obtaining refunds is the responsibility of the employee who charged it and if not able to obtain the refund, the employee is responsible to reimburse the county.

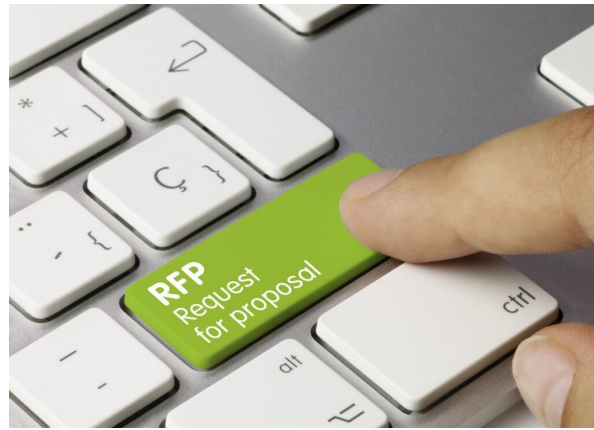
The traveler is responsible to work with the travel card reconciler to submit receipts and ensure that a PO is done within two weeks of the travel end date.

The screenshot shows a web application interface for travel management. At the top, there are navigation tabs: Search, Request, Status Tracking, P.O. Generation, and Travel Web Sites (which is currently selected). Below the tabs, there are several sections of links and information:

- General Travel:** Links to Expedia, Orbitz, Kavak, One Travel, and Travelocity. A note states: "Please note that you may want to use these general websites to search for the least expensive airfares, hotel rate, or car rental rates. However, once you find the least expensive rate, you may want to purchase directly the company's website to avoid fees and/or surcharges." Below this is a red link: [**County Travel Policy**](#).
- Airline:** Links to American, Northwest, Continental, Southwest, Delta, and United. A note states: "For discounted refundable tickets, contact the State of Utah Travel Coordinator at 801-538-3350 or statetravel@utah.gov or <https://statecontracts.utah.gov/Home/Search>".
- General Hotel:** Links to Hotel Kingdom, Hotels.com, Lodging.com, Mileage, and Mapquest.
- Hotel:** A list of hotel brands with their included properties:
 - Choice Hotels:** Includes Comfort Inn/Suites, Quality Inn, Sleep Inn.)
 - Hilton:** Includes Hilton, Doubletree, Embassy Suites, Hampton Inn, Homewood Suites.
 - InterContinental Hotels Group:** Includes Holiday Inn, Crowne Plaza, Candlewood.
 - La Quinta**
 - Mariott:** Includes Marriott, Renaissance, Courtyard, Residence Inn, Fairfield Inn, Townlace Suites, SpringHill Suites.
 - Starwood:** Includes Sheraton, W Hotels, Westin.

At the bottom, there is a note: "For discounted car rentals, contact State of Utah at 801-538-3350 or statetravel@utah.gov". Below this is another note: "Reference current car rental contracts with the state - <https://statecontracts.utah.gov/Home/Search>".

Finally, there is a list of car rental companies: Alamo, Avis, Budget, Dollar, Enterprise, Hertz, National, and Thrifty.



RFPs, ITBs and RFQs

Ever wonder what the difference is between an RFP, ITB, and an RFQ? Here's a quick overview.

RFP—A Request for Proposals is a formal solicitation issued when we want goods or services, and price is not the only factor. These are advertised through the State UP3 site (SciQuest), the County website, and in the newspaper. An RFP will establish several criteria to evaluate the proposals, and the proposals are evaluated by an Evaluation Committee, who submits their recommendation to the commissioners for final selection.

ITB—An Invitation to Bid is very similar to an RFP, except that the only determining factor is price. As long as the bidder meets all of the criteria, and can accomplish the full scope of work requested, the lowest bidder gets the contract. ITBs are advertised through the same channels as an RFP.

RFQ — A Request for Quotes is a less formal method of requesting quotes. It can be done through SciQuest, GovQuote, or directly to vendors.

For purchases over \$50,000, a formal RFP or ITB is required. These must be coordinated through Purchasing (as well as the Attorney's Office). Purchases under this threshold can be done through an RFQ or simply by requesting competitive quotes from vendors. Although an RFP or ITB is not required for purchases under \$50,000, it is sometimes still a good idea to issue one if we believe that we can realize significant savings by doing so.