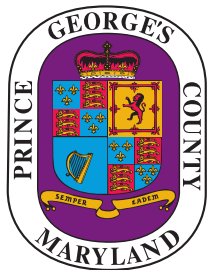


OVERVIEW OF THE PROCUREMENT PROCESS



Angela D. Alsobrooks
County Executive

DOING BUSINESS WITH
PRINCE GEORGE'S COUNTY
GOVERNMENT

PROUD TO SERVE.

METHODS OF PROCUREMENT

- 1 Formal Competitive Bidding
- 2 Informal Competitive Bidding (Small purchases)
- 3 Contract Negotiations (Non-competitive contracts)
- 4 ARC Process

FORMAL COMPETITIVE BIDDING

Solicitations are advertised on
County's website:
www.princegeorgescounty.gov

and in the County
Newspaper of Records:

- Enquirer Gazette
- Prince George's Post
- The Sentinel

INVITATION FOR BID 10A-112

Initiated for competitive sealed procurements exceeding \$30,000 , for commodities only, where the lowest price is the determining factor.

MULTI-STEP INVITATION FOR BID 10A-112

Initiated to procure goods and services of a technical nature exceeding \$30,000, utilizing pre-determined Best Value criteria evaluated by a selection committee.

REQUEST FOR PROPOSALS 10A-113

Procurements of a complex nature exceeding \$30,000, where the County is seeking a solution. Utilizes a Proposal Analysis Group for evaluation.

GENERAL

PROCUREMENT PROCESS (OVER \$30K)

- 1 Agency sends new/revised requirements (SOW/Best Value criteria, if for a service, and price sheet to Procurement Officer assigned to that agency.
- 2 Procurement Officer reviews for consistency, makes revisions, and gets concurrence from agency on SOW and requirements.
- 3 Procurement Officer completes and submits the Supplier Diversity and Development Division (SD3) Recommendation Form, along with SOW, requirements, and waiver request, if applicable, to SD3 for a recommendation based on research in SD3 database.
- 4 Recommendation is returned to Procurement Officer and shared with agency.
- 5 Procurement Officer prepares and submits waiver package for Waiver Board approval, if applicable.
- 6 Procurement Officer prepares and issues solicitation.
- 7 Procurement Officer conducts Pre-bid conference.
- 8 Procurement Officer issues addendum with questions, answers, or any clarifications.
- 9 Proposals are submitted based on closing date.
- 10 Proposals are evaluated.
- 11 Award recommendation
- 12 Term contract issued and loaded in SAP.

PROPOSAL ANALYSIS GROUP (PAG) PROCESS (WHEN APPLICABLE)

- A.** Composed of 3-5 voting members who have the background necessary to evaluate proposals and determine a responsible proposer. Also includes non-voting members from the Office of Law and the Supplier Development and Diversity Division.
- B.** Agency Head sends a request to the Purchasing Agent requesting assistance for the formation of a Proposal Analysis Group to solicit for competitive proposal items or services.
- C.** Agency Head sends a request to the Purchasing Agent requesting assistance for the formation of a Proposal Analysis Group to solicit for competitive proposal items or services.
- D.** PAG determines schedules and milestones for completing the assignment within required timeframes.
- E.** Conduct site visits and/or oral reviews with qualifying proposers.
- F.** Evaluates and analyzes proposals for the purpose of making a recommendation to the Purchasing Agent.
- G.** Ensure confidentiality of the process.

INFORMAL COMPETITIVE

(SMALL PURCHASES
10A-115)

A small purchase is any contract not to exceed an aggregate amount of \$30,000 for goods or services. Under \$30k Restricted to CBSB, unless not at least 2 responsive bidders, or price is 12% higher than market value.

CATEGORY 1

Less than \$1,000 (quote as practical)

CATEGORY 2

Less than \$2,000 (2 written quotes)

CATEGORY 3

Less than \$10,000 (3 written quotes)

CATEGORY 4

Less than \$30,000 (3 written requests for quotes)

PROUD TO SERVE.

INFORMAL COMPETITIVE

(SMALL
PURCHASES
10A-115)

- 1 Agency determines a need.
- 2 Review of SD3 Directory, which is updated every two weeks, to determine if there is a County-based small business that can do the work.
- 3 If there is a County-based small business, agency enters a shopping cart, goes through required approval, purchase order generated, supplier is paid.
- 4 If not a County-based business in Directory, agency will submit small waiver request to Procurement Officer, with any applicable quotes or proposals.
- 5 Procurement Officer reviews and submits to SD3 to vet and make a recommendation.
- 6 Procurement Officer does an internal determination under 115 Code, and submits to management for signatures.
- 7 Internal determination is sent to agency.
- 8 Agency shopper enters cart, attaches the determination, goes through approval process, PO is generated, supplier is paid.

MORE ABOUT PURCHASING

- 1** Purchases for \$2,500.00 or less are exempt from the SD3 review. However, competition is always encouraged, so agencies should utilize the spend categories to guide the process.
- 2** If there is a term contract or if the vendor is registered in SAP, a shopping cart should be entered and PO generated.
- 3** If there is a recurring need for a commodity or service, the agency should contact the Procurement Officer to follow a formal solicitation process.
- 4** P-Cards do not fall under procurement. Although there is a \$5,000.00 limit for P-card purchases, agencies are asked to follow the guidelines as described under 10A-115 when using the P-card.

ADMINISTRATIVE REVIEW PROCESS (ARC)

1 The Administrative Review Process was
— established for the review and execution on the County's behalf of all deeds, contracts, and other legally binding instruments which require the signature of the County Executive or his designee under Section 402 (8) of the Charter.

2
— This process is used for Administrative and Executive Orders, which involve the encumbrance or other commitment of County funds including Federal, State and other grant applications, acceptances or modifications.

HOW TO COMPILE ARC PACKAGES

- 1 Agency drafts two-Party Agreement, and submits for OOL review for legal sufficiency, and Risk management for insurance language, including SOW and requirements.
- 2 After review and approvals are obtained, package is forwarded to supplier for review/signature, along with applicable documents (corporate acknowledgement, debarment, etc.).
- 3 Acquire letter of Good Standing and Certificate of Insurance.
- 4 Complete ARC transmittal checklist.
- 5 Compile five (5) packages for submission to agency head of review/signature.
- 6 Submit to ARC Committee for Approval.

CONTRACT NEGOTIATIONS (10A-114)

1 COOPERATIVE PURCHASING WITH OTHER JURISDICTIONS (RIDERS)

- Services or goods that are provided in collaboration with another Governmental entity.

2 SOLE SOURCE (ONLY PRACTICAL SOURCE)

- When it is determined that competitive sealed bidding or competitive sealed proposal cannot be used because there is only one available or practical source.

3 EMERGENCY PROCUREMENTS

- An unanticipated emergency leaves insufficient time to use the procedures to abate the situation.

4 SPECIAL CIRCUMSTANCES

- A Public Exigency will not permit a delay incident to advertising.

SHOPPING CART PROCESS ROLES & RESPONSIBILITIES

AGENCY

The agency is responsible for entering shopping carts for SAP registered vendors, with all applicable documentation and information. The agency is also responsible for tracking the status of their shopping carts from the beginning of the process until invoices are paid.

PROCUREMENT (OCS)

Procurement is responsible for reviewing the shopping carts for all required documentation and information before approving the cart. Procurement is responsible for sourcing approved shopping carts into a purchase order.

AGENCY FINANCIAL APPROVAL

The financial approval role verifies the account assignment information based on agency budget.

OMB

OMB is responsible for confirming the availability of funds based on cost center.

CONDITIONAL APPROVALS (If Applicable)
The financial approval role verifies the account assignment information based on agency budget.

- 1 — Special purchases approvals are done by the Office of Information Technology, Fleet Management , and Public Safety. This done prior to shopping cart approval.
- 2 — Capital Assets approvals are done by the General Services Division for assets over \$5,000.00.



CONTRACT ADMINISTRATION & PROCUREMENT

OFFICE LOCATION:

1400 McCORMICK DRIVE, SUITE 200
LARGO, MD 20774
PHONE / 301-883-6400
FAX / 301-883-6440

<http://centralservices.mypgc.us>

THANK
YOU

JONATHAN BUTLER
DIRECTOR

SHAWN BROOKS
DIVISION MANAGER

P R O U D T O S E R V E .