

WELCOME





OC Procurement Alliance Meeting

City of Irvine
Los Olivos Community Center
101 Alfonso
Irvine, CA 92618
November 17, 2022

Agenda



- I. Procurement Alliance Networking Bingo
- II. Introductions
- III. CoProcure Updates
- IV. County Cooperative Contracts Updates
- V. County Procurement Professionals Program
- VI. County Compliance Program
- VII. Vendor Management Program
- VIII. Special Topics Open Forum
- IX. Network - Group Activity
- X. Open Forum
- XI. Survey
- XII. Next Meeting Location and Date – Tentatively March 9, 2023

Introduction



- Welcome
- Updates

CoProcure Updates



- Walkthrough of platform and updates
- Reminder to include coop language in all solicitations and contracts
- Other County Procurement System Updates (DocuSign ELA, ERP RFP)

Emergency Cooperative Contracts



- Disaster Preparedness and Emergency Contracts

<https://cpo.ocgov.com/oc-procurement-alliance/disaster-preparedness-and-emergency-contracts>

- More categories will be added on an ongoing basis



EMERGENCY CONTRACTS SUBPAGE

Countywide Cooperative Contracts



- Street Sweeping
- Photography/Videography
- Heavy Equipment Rental
- Legal Process Services
- HVAC Preventative Services
- Alarm Monitoring Services
- Language Translation Services – Sign and Written
- Landscape Services
- Project Kinship
- Meals on Wheels
- Transportation Services
- Furniture Cleaning Services
- Credit Check/Employee Background Check
- Erosion Control
- Roofing Maintenance

Cooperative Suggestions

Helen Hernandez at Helen.Hernandez@ocgov.com

Lara Seto at Lara.Seto@ocgov.com

County Procurement Professionals Program



This is a handout you can grab on your way out if you're interested in reading more of the details.

WELCOME!!



Setting the path for Trailblazer Success!

Procurement Professionals Workgroup

JOIN US!

The goal of our workgroup is to develop a County of Orange Procurement Professionals Program which fosters a culture of continuous development and elevates the procurement profession and talent within our DPA Community! We're so happy you're here to help us continue to blaze a trail to transformation for our future Procurement leaders.

Objectives:

- Develop a Deputy Purchasing Agent Mentorship Program
- Revamp our County of Orange Internship Program
- Organize the FIRST EVER **Procurement Professionals Day**
- Plan & Organize Annual Retiree Lunches
- Revamp the DPA Training Program
- Procurement Certification Infographic
- DPA Networking Events
- Introduce On-Boarding Program for new DPAs
- Professional Development Book Club

WORKGROUP SCHEDULE

2nd Tuesday of each month

1:30 pm-2:30 pm

Attendance is key to Workgroup Success!

Workgroup Leads

Daniel Vu - davu@ochca.com
Debbie Box - dbox@ochca.com

CPO Sponsor

Nicole Swain - nicole.swain@ocgov.com

CONTACTS

Presented by Nicole Swain

Procurement Professionals Day

February 22, 2023



Our Procurement Professionals Workgroup is hosting the County's first....

Procurement Professionals Day

Currently Scheduling.....

- ✓ Professional Headshots
- ✓ Partner Booths for Professional Certification
- ✓ "The Power of Linked In" Micro Training"
- ✓ Mock Interviews & Resume Tips
- ✓ Professional Development Book Club Booth
- ✓ And more

Formal Invitation to follow



How to Become a County of Orange Deputized Purchasing Agent



County staff pursuing their Deputy Purchasing Agent Certifications through the County Procurement Office are required to complete the following:

- ✓ In partnership with the NIGP: The Institute for Public Procurement, we require completion of the On Demand Course: Foundations of Strategy and Policy, which provides 10.50 hours of Contact hours
- ✓ Pass a 2-hour Exam
- ✓ Provide the County Procurement Office with a copy of the NIGP Completion Certification
- ✓ The Contract Policy Manual and Study Guide is distributed for the County's DPA Exam
- ✓ If passed, there is a swearing in ceremony with the Chief Procurement Officer, Maria Agrusa

DPA Training Calendar



Orange County Procurement Alliance



Title of Training	Title of Training	Title of Training	Title of Training	Title of Training
County Contract File Folders Training	P&P Supplier Evaluation	Determining Supplier Evaluation to include determining responsibility, responsiveness and assessment against evaluation criteria	The Values and Guiding Principles of Public Procurement	Multi-Award Contracts
Training for Retention Policy (State of CA)	Solicitation Development, Evaluation and Contract Management	Develop contract file standard/template (what should/not be in official contract record. Contract to include data/tracking record notating all electronic records not contained in central file and specific location.	Federal & California State Law requirements	Contracts for Outside Legal Counsel-Exemptions
County of Orange - Contract Administration Training	Standardized County Signature Delegation Authority	Trailblazer Series: (Providing Excellent Customer Service, Communication, Transparency, Enhanced Relations with Program, Budget & Accounting, Coaching, Transformation initiative)	Marketing the Value of Procurement	Debriefs to Non-Winning bidders and proposers
Management of Solicitation Folders Trainings	Insurance Training	The Importance of Documentation	Confidential Information and Integrity of the Process	Building the "Bridge of Communication" with your Customers
Retention Requirements for Official Contract File Folders	Budget Book Review to Forecast and Plan (Plan with Budget Team)	The Values and Guiding Principles of Public Procurement	Pricing Methods	Marketing the Value of Procurement

Vendor Information Day 1st Thursday of every other month 9:00 am-10:30 am | RSVP required with the County Procurement Office for OC Procurement Alliance members. RSVP to cpo@ocgov.com

More on DPA Trainings



- DPA Trainings are added throughout the year, as new Programs are progress
- Enhanced Ethics Training
 - Exam
 - Certification of Completion
 - Required Bi-Annually



BLAZEforward Mentorship Program



DPA Flash/Transactional Mentorship

- Custom Profile Matching
- 1-3 Sessions MAX
- To develop specific Procurement/Contracts Function
- Agenda Support
- Scheduling Assistance

In partnership with:



OC Procurement

COMING SOON

BLAZEforward
DPA Mentoring Program
in partnership with NIGP

DEVELOP NEW SKILLS AND CONNECT WITH
PROFESSIONAL PROCUREMENT EXPERTS LOOKING TO
SHARE THEIR INVALUABLE COUNTY KNOWLEDGE &
EXPERIENCES

Offering:

- Customized profile matching for mentor/mentee pairing
- Professional Development Mentorship
- Transactional/Flash Mentoring

OPEN TO ALL DPAs
Available on a first come, first serve basis to program capacity.

DPA Professional Development

- Custom Profile Matching
- 6-month Program (Meeting 1-2 times a month based on availability)
- Short- and Long-Term Goal Setting
- Career Advice
- Professional Development
- Pre-Generated Agendas
- Scheduling Assistance

County of Orange Procurement Internship Program Revamp



Coming EARLY 2023

- ✓ Expansion to local universities
- ✓ Looking to partner with OC Alliance on this revamp to develop a shareable "Intern Index"

Interested in joining us?

Please reach out to Nicole Swain - nicole.swain@ocgov.com

County Procurement Audit Program



2022 - Transitioned from Compliance Reviews to Compliance Audits

- **Compliance Audits – Consist of 2 Phases**

Compliance Audit Team: 4-8 DPA Participants are actively involved in Phase 1 and Phase 2

- Phase 1 -
 - Data Analysis Procurement Reports Review
 - Select File Folder & P-Card docs to review
- Phase 2 – File Folder and P-Card Doc Reviews

County Procurement Audit Program



Example

Folder No.	Agreement ID	Vendor Name	Proc. Type	Not to Exceed Amt	Start Date/ Record Date	End Date	Contract Type	Doc Description	Buyer Name	Renewals	Board Date
12345	MA00112345678	THE BEST CO.	RFP	250,000.00	8/1/2021	7/30/2022	SERVICE	THE BEST SERVICES	BETTY BUYER	4	N/A
	REGULATION TYPE	TOPIC	REGULATION REFERENCE	FINDING			CORRECTIVE ACTION	STATUS			
FINDING 1	GOVERNMENT CODE	PROCUREMENT REQUISITION	25501 The purchasing agent shall make purchases, rentals and contracts only upon proper written requisition	PROCUREMENT REQUISITION NOT LOCATED IN PROCUREMENT FOLDER			OBTAIN AN APPROVED PROCUREMENT REQUISITION AND FILE IN FOLDER	Fully Implemented Partially Implemented In Progress Not Yet Implemented Implementation Date:			
FINDING 2	GOVERNMENT CODE	BOARD APPROVAL	25502.5 (a) In counties having a population of 200,000 or more, the board of supervisors may authorize the purchasing agent to engage independent contractors to perform services for the county or county officers, with or without the furnishing of material, when the annual aggregate cost does not exceed two hundred thousand dollars (\$200,000)	CONTRACT EXCEEDED BOARD APPROVAL THRESHOELD; BOARD APPROVAL WAS NOT OBTAINED			OBTAIN BOARD OF SUPERVISORS APPROVAL	Fully Implemented Partially Implemented In Progress Not Yet Implemented Implementation Date:			

For more information:
Adriana Nieto
 Adriana.Nieto@ocgov.com

County Vendor Management Program

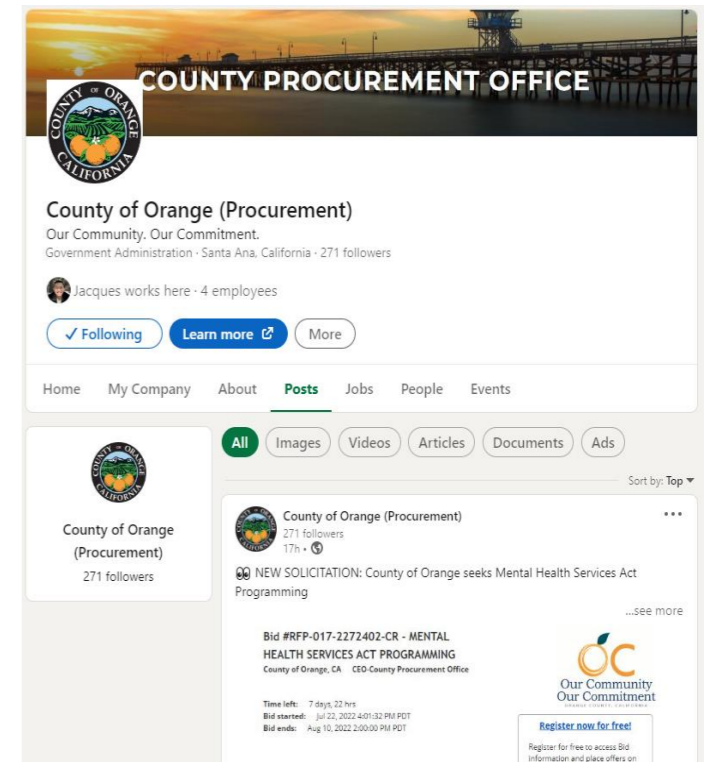


- Dedicated Position and Program to Focus on Vendor Management
- Expansion of current Local Small Business and Disabled Veteran Business Enterprise Programs
- Equity in Contracting
- Centralized Federal DBE and Title VI Programs
- D&B vs SAMS

Open Forum



- Social Media - County's LinkedIn page for event updates
- Huge Focus on Outreach
 - City, Special District Events
 - Trade Show / Specialty Group Events
- County Vendor Information Day – Bimonthly, 12/1
- Vendor Lunch and Learn Training Sessions
- Annual Vendor Outreach Event



County Vendor Survey Results



Ways the County can further improve doing business

- Better outreach/communication
- Requirements/contract terms too restrictive
- Payment too late to vendors
- Process too impersonal

Interaction with County staff during negotiation process and life of contract

- Improve communication
- Timeliness of payments
- Process is too lengthy

Identify pertinent functionality of highest importance to company when utilizing a bidding system and responding to a solicitation

- Ease of use
- Relevant communication
- Quick sign-ups
- Ample time to complete/submit

Feedback/suggestions on how Annual Vendor Outreach Event can bring most value

- More advertisement/time to plan to attend
- Have event more than once a year
- Have leadership on hand for variety of services
- Create an option for virtual attendance

Vendor Outreach Event



- 2023 – Tentative Date is May 11, 2023 , Mile Square Park unless any City has a larger venue with better parking
- More representation from our local Cities, departments, districts, etc.



Special Topics Open Forums



- **Levine Act -**
 - In 1982 the Legislature passed the Levine Act to generally prohibit members of appointed governing bodies from accepting or soliciting contributions of \$250 or more from those who have had within a certain period of time, a contract, license, or permit pending with the governing body.
 - SB1439 makes the Levine Act applicable to members of boards of supervisors and city councils effective January 1, 2023
 - County's Plan – at time of solicitation the County will ask all proposers to disclose any contribution of over \$250 to our Board members. Should any disclose a contribution that Board office will be notified and given the option to XXX from the Board vote or return the contribution prior to the vote
 - The Levine Act's reference to "license, permit, or other entitlement for use" means "all business, professional, trade, and land use licenses and permits and all other entitlements for use, including all entitlements for land use, all contracts (other than competitively bid, labor, or personal employment contracts), and all franchises." While the Levine Act excludes labor and personal employment contracts, its exclusion for "competitively bid" contracts only apply to contracts where the Board must select the vendor that submitted the lowest responsible bid, such as public works contracts under the Public Contracts Code. (Greenwald FPPC Advice Letter, No. I-93-220.) The exclusion does not apply to contracts solicited by requests for proposals or invitations for bids where the Board has the discretion to select a vendor that the Board determines best meets the County's interests.
- **ARPA**

Possible PPE Surplus



- The County continues to evaluate our PPE stock and the following items are available for surplus. Please reach out to your entities or contracted non-profits for interest:

Row Labels	Sum of 11/1/22 Each
Face Shield	844,077
Goggles	441,985
Gowns	1,765,922
N95	2,475,690
PPE (shoe covers, caps, etc)	668,461
Surgical/Procedure Mask	1,041,980
Grand Total	7,238,115

Network – Group Activity (there are prizes involved)



- Divide into groups of X people (or by table)
- That table that comes up with the best Vision (or Mission) Statement for the Alliance
- Also comes up with 2023 initiatives to support that vision/mission
- Provide suggestions on how we can grow and expand the Alliance
- Think of ways to leverage the knowledge, resources, spending power, etc. of our region

Open Forum



- Finalize the Mission/Vision, 2023 goals/initiatives that the groups come up with
- Last call out for any other items??

Wrap Up



Next meeting – March 9, 2023
Morning, or Afternoon Preferred?

Volunteers to host?

Conduct Survey

Don't forget to follow the County's LinkedIn page for event updates, solicitations, employment opportunities, etc.

COUNTY PROCUREMENT OFFICE

County of Orange (Procurement)
Our Community. Our Commitment.
Government Administration · Santa Ana, California · 271 followers

Jacques works here · 4 employees

✓ Following Learn more More

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County of Orange (Procurement)
271 followers

NEW SOLICITATION: County of Orange seeks Mental Health Services Act Programming

Bid #RFP-017-2272402-CR - MENTAL HEALTH SERVICES ACT PROGRAMMING
County of Orange, CA CEO-County Procurement Office

Time left: 7 days, 22 hrs
Bid started: Jul 22, 2022 4:01:32 PM PDT
Bid ends: Aug 10, 2022 2:00:00 PM PDT

Register now for free!
Register for free to access Bid information and place offers on



**Wishing the Alliance a safe and
happy holiday season!!**

Thank You!