

Section and Title in Proposed Policy	Section in current Manual	Difference
Section 1 Authority and Responsibilities		Change in section number, moved definitions (previously Section 1) to be part of new Section 12
1-1 Authority	2-1	No substantive change, broke language into subsections (a) and (b)
1-2 Authorization	2-2	Removed gender specific reference to Purchasing Agent, added "Purchasing Manager" as an employee assigned to the Purchasing Division and added citation reference-no change in authorization, language added for clarification.
1-3 Delegation	2-3	No substantive change, broke language into subsections (a) and (b)
1-4 Responsibilities	2-4	Change in section number only, redline shows addition of language already present.
Section 2 General Procurement	3	
2-1 Policy Statement	3-1	Added applicability of Federal Procurement Standards when using federal funds; clarified exclusion of Public Works projects under Public Contract Code (no change in policy); added the purchase/surplus of real property and zero dollar MOUs to exclusions, added clarifying language regarding policy language as it relates to the specific section numbers.
2-2 Competitive Procurement	3-2	Removed gender specific reference to Purchasing Agent, moved allowance of cooperative contracts from "exceptions" section to this section.
2-3 Exceptions to the Competitive Process	3-3	Change in section number only
2-3.1 Waiver of Competitive Procurement	3-2.1	Moved allowance of cooperative contracts from this section to section 2-2
2-3.1.1 Sole Source Justification	3-3.1.1	Added language that Purchasing Agent or designee shall approve sole source; added clarification, to support existing County Code, that Purchasing Agent shall report sole source greater than \$10,000 to the Board of Supervisors; added language that the Purchasing Agent may require Board approval for Sole Source.
2-3.1.2 Election Material	3-3.1.2	Clarified language, no change to existing policy
2-4 Unauthorized Purchases	3-4	Clarified language, no change to existing policy
2-4.1 Personal Use Items	3-4.1	Change in section number only
2-5 Standardization	3-5, 3-5.1, 3-5.2	Combined sections, removed reference to specific stationary standards+
2-6 Ethical Standards	3-6	Clarified language, no change to existing policy
2-6.1 Gifts and Special Consideration	3-6.1	Changed reference to new protest and appeals section
2-6.2 Practices	3-2.2	Change in section number only
2-6.3 Conflict of Interest	3-6.2	Change in section number only
Section 3 Goods, Material, Supplies, and Equipment	4	Added rentals to section; added clarifying language that installation and assembly services may be included on a purchase order for related goods; added applicability of Federal Procurement Standards.
3-1 Purchase of goods under \$5000	4-1	Changed \$1,000 to \$5,000; added language allowing Purchasing Agent to specify when a blanket purchase order is required; added allowance for Purchasing Agent to require requisitions for specific items regardless of cost; added allowance of Purchasing Agent to develop requirements for documentation included with direct invoice entry of invoice payments.

3-2 Purchase of goods \$5000 and more	4-2	Changed \$1,000 to \$5,000; changed language from paper driven process to electronic process; added language clarifying that 3 quotes or sole source is required; defined electronic workflow and requisition conversion approvals; added language allowing Purchasing Agent to require blanket purchase orders.
3-3 Emergency Purchases	4-3	Changed language from paper driven process to electronic process; added alliances during declared disaster; added applicability of Federal Procurement Standards when Federal Disaster has been declared.
3-4 Sole Source Justification	4-4	Added "Uniqueness" and "Urgency/Timeliness" as allowable sole source reasons; added clarification, to support existing County Code, that Purchasing Agent shall report sole source greater than \$10,000 to the Board of Supervisors; added language that the Purchasing Agent may require Board approval for Sole Source
3-5 Leases	4-5	Added subsections
3-5.1 Goods, Material, Supplies and Equipment	New	Specified goods, material, supplies and equipment; added reporting requirements; added language requiring finance, equity and open-ended leases be approved by County Debt Committee and Board of Supervisors
3-5.2 Real Property-When County is Lessee	New	Added to policy to support current County Code
3-6 Offer and Acceptance	4-6	Clarified language, no change to existing policy
3-7 Solicitation of Informal Quotations and Proposals	4-7	Removed language that mandates the Purchasing Division evaluate each purchase and initiate the most appropriate method of purchase.
3-7.1 Informal Requests for quotations	4-7.1	Change of section number only
3-7.2 Informal Requests for proposals	4-7.2	Added ability to issue informal request for proposals via email; minor punctuation changes
3-7.3 Oral Purchase Commitments	4-7.3	Change of section number only
3-8 Formal Competitive Procurement	4-8	Minor proofreading changes, update section citations
3-9 Procedures for Purchasing Capital Assets	4-9	Changed "Fixed" to "Capital"; updated language from manual to electronic processes; amended definition to include "...and have a useful life of greater than one year"; clarified language pertaining to the CEO's ability to approve alternate Capital Assets needed to be similar in nature.
3-10 Receiving	4-10, 4-10.1, 4-10.2, 4-10.4	Separate receiving and authorization for payment.
4-11 Payment of Purchase Order	4-10.3	Removed statement that Purchasing process payment of invoices for purchase orders
3-12 Local Vendors Price Preference-Goods, Material, Supplies and Equipment	4-12	Specified "Goods, Material, Supplies and Equipment in section header; minor proofreading changes
Section 4 Requisitions and Purchase Orders	Sections 5 & 6	Consolidated pertinent sections of two sections into one; proof reading and format changes, no change to Policy
4-1 Specifications	6-6, 6-8	Minor wording change - Change "falsely limits..." to "artificially limits....", minor proofreading edits - no change to policy
4-1.1 Merchant Contact and Assistance in Writing Specifications	6-7	"Change "Vendor Contact" to Merchant Contact", wording changes-no change to policy; added citation of Government Code for conflict of interest
4-1.2 Review of Specifications	6-9	Minor wording change, no change to policy
4-2 Types of Purchase Orders	5-1	Change in section number only
4-2.1 Normal Purchase Order	5-1.1	Change in section number only

4-2.2 Blanket Purchase Order	5-1.2, 5-1.2.1to 5-1.2.3	Change in section number, add ability of Purchasing Agent to require use of BPO for high volume/repetitive type items, regardless of value of each transaction.
4-3 Record Retention	5-2.1	Added allowance of Federal and State law and County retention schedule to be considered.
4-4 Exception to Using Purchase Orders	5-3	Added language that puts responsibility on Departments to create a tracking method if no tracking method is developed by the Purchasing Agent; added language authorizing Purchasing Agent to specify items or types of items for which the use of requisitions and purchase orders are not required
4-5 Encumbrance of Purchase Orders	5-4	Changed wording from that of manual process to electronic process.
4-6 Distribution of Purchase Orders	5-5	Removed procedure language and manual process language. Added that Departments are responsible for sending purchase order to vendor.
4-7 Changing Purchase Orders	5-6	Changed wording from that of a manual process to electronic process, added language that a request to cancel a PO shall be approved at a workflow level no lower that the level of original approval.
Section 5 Formal Solicitations [Request for Proposals, Request for Qualifications, and Invitation for Bids]	Section 8	Moved section on solicitation in front of section on contracting.
5-1 Competitive Sealed Proposals - Requests for Proposals	8-1	Change wording, clarified that experience, qualifications and solutions are drivers for overall value and generally ranked above price.
5-1.1 Merchant Contact and Assistance in Writing Specifications	New	Added to provide clarity on what is allowed and reference to CA Government Code section regarding conflict of interest
5-1.2 Conditions For Use	8-1.1	Change in section number only
5-1.3 Evaluation Philosophy	8-1.2	Change in section number only
5-1.4 Evaluation Panel	8-1.3	Change in section number and cross reference section number
5-1.5 Evaluation Criteria	8-1.4	Added clarifying language, no change to policy
5-1.6 Procedures for Request for Proposals	8-1.5	Change in section number only
5-1.7 Public Notice	8-1.6	Added language clarifying that posting RFP on County's webpage constitutes public notice.
5-1.8 Receipt, Opening, and Recording of Proposals	8-1.7	Changed language to allow for the electronic submission of proposals, as long as requirements of CA Public Contract Code are met.
5-1.9 Evaluation of Proposals	8-1.8	Changed "should" to "shall" for review of proposals for adherence to meeting requirements.
5-1.10 Discussions with offerors and Revisions to Proposals	8-1.9	Added clarifying language; removed ability to re-score proposals after discussions.
5-1.11 Contact Negotiations	8-1.10	Added ability to negotiate with multiple firms at one time if award will be a multi-award contract
5-1.12 Intent to Award	8-1.11	Changed requirement from 5 working days to 7 calendars for provision of notice.
5-1.13 Records	New	Requires Departments to keep record of RFPs
5-2 Competitive Sealed Proposals-Request For Qualifications	New	Provides policy for issuance of Request for Qualifications and mirrors sections for RFPs
5-3 Competitive Sealed Bidding - Invitation for Bids	8-2	Change in section number only
5-3.1 Public Notice	8-2.1	Added language clarifying that posting RFP on County's webpage constitutes public notice.
5-3.2 Preparation of Bid Specifications	8-2.2	Changed wording, no change to policy.

5-3.2.1 Merchant Involvement	8-2.2.1	Changed "Vendor" to "Merchant"; added to provide clarity on what is allowed and reference to CA Government Code section regarding conflict of interest
5-3.2.2 Restrictive Specifications	8-2.2.2	Change in section number only
5-3.2.3 Other Consideration	8-2.2.3	Change in section number only
5-3.3 Bid Documents	8-2.3	Change in section number only
5-3.3.1 Copies of Documents	8-2.3.1	Clarified language pertaining to requirement of bid deposit and language stating County will not be responsible for errors in bids due to the use of incomplete bid documents.
5-3.3.2 Interpretation of Documents	8-2.3.2	Removed number of calendar days to request clarification and change to "as specified in the bid documents"
5-3.4 Substitutions	8-2.4	Change in section number only
5-3.5 Bid Addenda	8-2.5	Change in section number only
5-3.6 Bidders' Conference	8-2.6	Removed specific reference that bidders conference announcement be placed in a "Special Provisions Section"
5-3.7 Procurement schedules and Bid Opening Date	8-2.7	Removed requirement that bid be posted for at least 10 working days-changed wording to "sufficient time..."
5-3.8 Form of Bid	8-2.8	Change in section number only
5-3.9 Bid Security	8-2.9	Clarified language regarding bonds and deposits.
5-3.10 Receipt of Bids	8-2.10	Changed language to allow for the electronic submission of bids, as long as requirements of CA Public Contract Code are met.
5-3.11 Bid Opening	8-2.11	Added language clarifying what will be available at opening
5-3.12 Correction and Withdrawal of Bids	8-2.12	Change in section number only
5-3.12.1 General Rule	8-2.12.1	Added language clarifying what is/is not allowable
5-3.12.2 Waiving Informalities	8-2.12.2	Added language clarifying what is/is not allowable
5-3.12.3 Bid Withdrawal Prior to the Bid Opening	8-2.12.3	Removed reference to facsimile and restriction on electronic submission
5-3.12.4 Judgmental Errors	8-2.12.4	Added language clarifying what is/is not allowable
5-3.12.5 Correcting Mistakes in Bids	8-2.12.5	Added language clarifying what is/is not allowable
5-3.12.6 Confirmation of Bid	8-2.12.6	Changed wording, no change to policy.
5-3.13 Bid Evaluation	8-2.13	Change in section number only
5-3.14 Reservation of Right to Reject Bids and/or Require Rebid	8-2.14	Removed County's ability to reject only part of a bid; added clarifying language
5-3.15 Bid Award	8-2.15	Change in section number only
5-3.15.1 Responsive Bid	8-2.15.1	Removed gender specific reference to Purchasing Agent
5-3.15.2 Responsible Bidder	8-2.15.2	Corrected typo, added clarifying language; added ability to contest determination
5-3.16 Cancellation of Bid Award	8-2.16	Change in section number only
5-3.17 Records	8-2.17	Change responsibility of maintaining records from Purchasing Division to originating department.
5-3.18 Tie Bids	8-2.18	Changed wording, no change to policy.
Section 6	7	
6-1 Use of Service Contracts	7-2	Moved code citations (previously Section 7-1) to be part of new Section 12 and incorporated into 6-2; added clarifying language
6-2 Criteria for Service Contracts	7-3	Change of section number only
6-3 Vendor selection - Service Contracts	7-4	Changed wording, no change to policy.
6-3.1 Vendor Selection Vendor Selection Professional Services...	7-4.1	Added reference to CA Gov't Code 4529 which allows County to not award professional services based on qualifications

6-3.2 Sole Source Justification-Services	7-4.2	Added "Services" to title; added requirement that Purchasing Agent approve Sole Source of \$25,000 or more.
6-4 Local Vendor Preference	7-5	Changed Public Works outreach meeting from twice yearly, and HHSA outreach meeting from quarterly, to annually; Removed requirement for HHSA to publish opportunities with the Non Profit Coalition (no longer exists); Removed reference to Risk Manager being available to answer questions prior to a proposal submission; Removed requirement of Purchasing to meet with Departments to clarify when sole source is justified (encompasses more than just local vendors); Removed requirement to report usage of local vendors in Budget Book (performance measures no longer being reported in budget book); Removed requirement to work with, and references to, Workforce Investment Board (no longer exists).
6-4.1 Specific RFP Language	7-5.1	Added language appropriate for use when federal funding is used.
6-5 Review By County Counsel and Risk Management	7-7 & 7-8.4	Moved so that section precedes section on award of contract; change Risk Manager to Risk Management and/or County Executive Officer (or designee); added allowance for use of vendor's form.
7-6 Award Authority for Service Contracts	7-6	Change of section number only
6-7 Required Approvals	7-8	Change of section number only
6-7.1 Service Contracts: Less than \$50,000 per annum and not exceeding five years in length	7-8.1	Changed Department Head approval level from less-than-\$10k to less-than-\$25k; added allowance for 5yr contract term; competitive solicitation not required under \$25k.
6-7.2 Service Contracts: \$50,000 Per Annum to Purchasing Agent's CPI-Adjusted Authority Level and Not Exceeding five years in length	7-8.2	Change reference to County Executive Office to Purchasing Agent (CEO is Purchasing Agent); Increased amount of contract that requires Purchasing Agent approval from \$10k to \$50k; increased contract term from three to five years; added language that allows CPI increase to continue as previously set (does not reset with approval of this policy); removed language that appears to have given Purchasing Agent ability to select from top three scored proposals instead of top ranked.
6-7.3 Service Contracts Greater Than the CPI-Adjusted Purchasing Agent Authority Level Per Annum or Exceeding Five Years In Lenth	7-8.3	Clarified that BOS approval level starts where Purchasing Agent's CPI-Adjusted authority caps, instead of \$50,000 plus CPI adjustment; changed contract term requiring BOS approval from three to five years.
6-8 Incremental Contracting	7-9	Change of section number only
6-9 Contract Term, Extension, and Amendment	7-10	Changed reference of three year contract to five year contract
6-10 Contract Termination	7-11	Change of section number only
6-11 Emergency Services	7-12	Removed reference to Emergency Purchasing of Goods and detailed out requirements
6-12 Conflict of Interest	7-13	Changed blackout period from two years to one; clarified Department Head's responsibility in determining conflict of interest which is now covered in the standard service contract template.
6-13 Procedures	7-14	Required Purchasing Agent to create minimal procedural standards for contracting process, allows departments to create their own standards as long as minimal standards developed by Purchasing Agent are met
6-14 Debarment of Vendors	9-4	Deleted language stating that debarment be for a period of not more than one year

Section 7 Protest and Appeals	10	Specifies that new policy is applicable to solicitations published after the effective date of this policy; Changed who is allowed to protest from "Any directly affected party..." to bidder or proposer; change protest timing from 5 work days from time of occurrence to 7 calendar days after Intent to Award is distributed or bid opening; specifies protests must be received by 5pm; allows County to continue solicitation process, but limits ability to award contract during a protest; provides authority of Purchasing Agent to have final determination, removing ability of protester to appeal to Board of Supervisors;
Section 8 E-Procurement	11	Removed gender specific reference to Purchasing Agent
Section 9 Surplus Property	12	Changed "Fixed Asset" to "Capital Asset"; minor edits that don't impact policy; added language that requires items purchased with federal or grant funds to be disposed of in a manner consistent with those terms and conditions.
Section 10 Environmentally Preferred Purchasing	New	Adapted from EPP procedural document that was created from an expired Board Policy; Included food and locally grown food to considerations; added requirements of CA Public Contract Code; added requirement that contractors meet requirements of Public Contract Code; incorporates limitation of using County funds for the purchase of single use bottled water that was approved by separate resolution; Removed requirement that County establish a sustainability Counsel (Sustainability Counsel covers more than just purchasing topics and is broader than what is appropriate for the Purchasing Policy), yet maintains requirement that Purchasing Manger be part of the Counsel if one exists; removed definitions that are not found in policy
Section 11 Procurement Card (P-Card)	New/Stand Alone Policy	Removed much of the "how-to" procedural language; removed ability for special districts to be part of County's program; added ability to use cards for leasing of land or property that are within the Purchasing Agent's authority; allows Purchasing Agent to set spending limits and category restrictions; removed examples of forms and related documents.
Removed	Section 9-Vendors	With capabilities of online searches and the County's ERP system, the manual processes in Sections 9-1 to 9-3 have become outdated. Moving Section 9-4 to Section 6-14 and removing language stating that debarment be for a period of not more than one year