

Policy Updates

The County's Public Infrastructure department Purchasing division team has updated the Goods, Services, Blanket Purchase Orders, and Construction policies to align limits with current procurement needs, and to provide departments with increased efficiencies.

The Construction policy is currently in the process of being updated to align with current California Uniform Public Construction Cost Accounting Act limits, which were amended January 1, 2025. This change will also require amendment of the Sonoma County Code, which will be brought to the Board April 22, 2025 for a first read.

Additionally, staff is in the process of updating its internal website to provide departments with more ease of reference when accessing procurement policies and information.

Increased Accountability

Recent audit and consultant findings have shed light on areas of procurement which lack sufficient oversight. Since Purchasing is not a centralized procurement team, departments procure their own contracts. Purchasing has been working with the Auditor's Office and Clerk of the Board to implement steps within the financial system and board item process to require departments to self-attest that they are following Purchasing policies by taking the required steps to procure contracts.

Training and Outreach

Purchasing has developed and conducted countywide trainings on Request for Proposals and Blanket Purchase Orders. The trainings are recorded and available to department staff who conduct procurement activities for the County. Future training topics will include a Purchasing Overview, Service Agreements, and others, with the goal of providing department staff with the necessary resources and understanding of procurement policies. Purchasing has also implemented a "Liaison" program whereby a Buyer is assigned to each County department, providing as-needed training and more individualized support. This program is intended to address gaps in training and to address procurement issues more proactively. Future goals include providing training and outreach to the supplier community and establishing a mandatory Purchasing training program for department staff who have a role in the procurement process. Finally, training has been prioritized for Purchasing team members, to ensure that they serve as subject matter experts on all government procurement topics.

Future goals for Purchasing include:

Modernizing Automation

Currently Purchasing utilizes a supplier portal to manage all solicitations; it is a module within the County's financial system. Based on feedback from suppliers, departments, and Civic Initiatives, it's evident the current system is no longer meeting procurement needs and is exposing the County to solicitation challenges and protests. Purchasing is seeking a more modernized solution for procurement and contract management and will be

submitting a Program Change Request as part of the FY 2025-26 Recommended Budget to seek additional funding for this purpose.

Delegated Authority

As part of the Organizational Excellence pillar of the County's Strategic Plan, Purchasing will be returning to the Board to recommend an increase to department head authority for services agreements, with the goal of increasing efficiencies and flexibility for contracts of smaller amounts. Additionally, Purchasing will be working with departments to develop a program to delegate certain procurement functions to trained designees within their agencies, with a continued emphasis on streamlining activities.