



## BEXAR COUNTY ADMINISTRATIVE POLICY

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### ADMINISTRATIVE POLICY NO.8.1

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**TITLE:** Purchase of Goods and Services and Procurement of Professional and Personal Services

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**REPLACES:** 2004 Purchase of Goods and Services and Procurement of Professional and Personal Services

**REVISION DATE:** September 1, 2009  
**EFFECTIVE DATE:** September 1, 2009

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#### **SECTION 1: PURPOSE**

The purpose of this policy is to establish guidelines and accountability for the expenditure of taxpayer funds used to procure goods and services used by the County departments and offices. The processes used to procure goods and services should always provide the best value for the County, while providing an open and fair process for vendors.

These policies are approved by the Bexar County Commissioners Court. Therefore, as necessary, appropriate revisions may be made to these policies at the discretion of the Commissioner Court. The Purchasing Agent shall be responsible for accurate maintenance and distribution of approved revisions. This information includes the rules, regulations, and procedures necessary to adhere to those policies.

#### **SECTION 2: GUIDING PRINCIPLES**

The Guiding Principles that follow have been developed by and for the use of all of Bexar County's departments and offices:

1. Employees will avoid any activity that would create a conflict between their personal interests and the interest of Bexar County and will avoid the appearance of unethical or compromising practices in relationships, actions, and communications. The types of activities that should be avoided include: accepting gratuities of any kind valued at more than \$25 from current or potential vendors; using confidential proprietary information for actual or anticipated personal gain; or disclosing a vendor's confidential proprietary information inappropriately to other vendors during the procurement process.

2. Taxpayers are best served by a purchasing program that encourages competition, prevents favoritism and obtains the best value for the best price. This includes involvement by small, minority and women-owned business enterprises (SMWBE) in the County's programs and purchases, to the greatest extent possible.
3. By working cooperatively, Bexar County can leverage purchasing volume for lower prices or other favorable terms. Bexar County will use cooperative arrangements where doing so will provide savings in time, money or other resources.
4. A livable community is based in part on the quality of its environment. Bexar County will buy environmentally friendly goods and services where doing so will not compromise quality or value.
5. In support of its mission to provide its citizens with quality services, Bexar County will continue to seek efficient and accountable methods of purchasing and maintaining county assets. Staff will use innovation and technology to enhance management of purchasing programs and expenditures.
6. Bexar County hires personnel with the skills necessary to provide quality services to its citizens. At times however, Bexar County may wish to use outside professional and personal services contractors. External professional and personal services will be sought when technical expertise is required which does not exist within Bexar County resources, or a temporary requirement exists that cannot be met by Bexar County's existing work forces, or it is necessary to receive advice and recommendations independently of the Bexar County workforce.

### **SECTION 3: ROLES AND RESPONSIBILITIES**

#### **COUNTY DEPARTMENTS AND OFFICES**

##### **General:**

The role of the Bexar County offices and departments shall be to utilize the services of the Purchasing Department for those purchases that are in excess of their purchase authority, and to work cooperatively to see that the necessary goods and services are procured to most efficiently serve Bexar County.

##### **Specific:**

1. Work cooperatively with the County Purchasing Agent and Commissioners Court to procure goods and services that maximize performance and achieve County goals;
2. Work with the Executive Director of Planning and Resource Management and the Purchasing Agent to strategically plan for procurement needs through the annual budget process;
3. Identify employees with purchase requisition and PCARD duties and ensure that they obtain necessary training in appropriate purchasing procedures before purchasing approval is granted;
4. Work with the County Budget Officer, Purchasing Agent, and Small Minority and Women Owned Business Enterprise Program Manager to include SMWBE

performance measures in County departments and offices annual performance measures where appropriate. Measures will be based on an analysis of the availability of SMWBEs to meet a department's procurement needs;

5. Work with the County Auditor and Purchasing Agent to facilitate the inventory of County asset types;
  6. Purchase ethically and not use their position to secure special privileges, prices or exemptions for themselves or others;
  7. Notify the Purchasing Agent and Commissioners Court of a business or personal relationship with a prospective vendor in writing and remove themselves from the procurement process;
  8. Comply with state law, County purchasing and SMWBE policies and procedures and attend training to obtain necessary knowledge;
  9. Refrain from using purchasing strategies designed to avoid formal competitive procurement procedures such as component purchases (purchasing in pieces rather than purchasing as a whole), separate purchases (purchasing goods in a series of separate purchases that normally would have been combined) and sequential purchases (purchases made over a period of time that would normally have been made as one purchase) that violate State law;
  10. Avoid submitting purchase requisitions to the Purchasing Department that would request expenditures in excess of existing budgeted funds;
  11. Maintain appropriate documentation to support purchasing transactions as outlined in County policies and procedures;
  12. Engage the Purchasing Agent for assistance in identifying SMWBEs when deciding on procurement needs;
  13. Purchase professional and personal services in accordance with law and the County purchasing policies and procedures;
  14. Work with the County Auditor and Purchasing Agent to facilitate the inventory of County asset types;
  15. Engage with the County Purchasing Agent for assistance with purchases of professional and personal services;
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16. Coordinate with the Bexar County District Attorney and submit forms and documents used for solicitation and contracting of professional and personal services for legal review to ensure documents and procedures reflect changes in the law and this policy;
  17. Discourage unsolicited verbal or written communications from competing companies which may pertain or relate directly or indirectly to any proposal being evaluated; and
  18. Recommend contracts for award based on demonstrated competence and qualifications for the type of goods or services to be performed at fair and reasonable prices.

## **PURCHASING AGENT**

### **General:**

The procurement procedures for goods and services for Bexar County are set forth in the Texas Government Code 262, Purchasing and Contracting Authority of Counties. The Purchasing Agent is responsible for the purchasing of goods and services in accordance with the procurement procedures for the County departments and offices.

### **Specific:**

1. Provide assistance to the County SMWBE Program Office with outreach efforts;
2. Seek out and solicit bids and proposals from SMWBEs in support of the County SMWBE policies;
3. Provide strategic purchasing advice and support to officials and to the Strategic Management Team as they develop operational programs;
4. Work with departments and offices to develop necessary forms, formats and procedures for approval by Commissioners Court, in compliance with law and Court policy statements;
5. Work with suppliers to ensure timely delivery of goods and services for County departments and offices for the greatest value and in compliance with the law and County purchasing policies and procedures;
6. Make purchases of goods and services that are in the aggregate, under \$50,000 and supervise the competitive process for purchases exceeding \$50,000;
7. Make recommendations for contract award to Commissioners Court for purchases supervised through the competitive purchasing process exceeding \$50,000 in the aggregate;
8. Resolve all internal and external complaints, and facilitate termination, demand for payment, cure notice, show cause and debarment procedures when deemed necessary in accordance with the law and County purchasing policies and procedures;
9. Provide training to assist County employees in compliance of the law and County purchasing policies and procedures;
10. Assist (when requested) with department recommendations for contract award to Commissioners Court for purchase of professional and personal services;
11. Unless otherwise directed by Commissioners Court, a written report of program statistics for the Purchasing Department will be provided on a quarterly and annual basis to the SMWBE Program Office and the SMWBE Advisory Committee;
12. Perform outreach to build partnerships with County offices, vendors and other public agencies;
13. Set ethical standards for ensuring an open and fair process and develop formats to ensure that standards are enforced;
14. Maintain open and regular communication between County departments and offices, County officials and Commissioners Court;

15. Coordinate with the Bexar County District Attorney and submit forms and documents used by the Purchasing Department for solicitation and contracting at least annually for legal review to ensure documents and procedures reflect changes in the law;
16. Work with Departments and offices to monitor vendor compliance with contract terms and conditions, quality of goods or services and timely renewal or re-bid;
17. Supervise the acquisition, tracking, monitoring, disposal, and reporting of County fixed and controlled asset types in accordance with law and County purchasing policy and procedures;
18. Provide assistance to County officials for purchases exempt from the competitive bid process;
19. Provide assistance to County officials for the purchase of professional and personal services;
20. Promote efforts to increase recycling and reduce waste when purchasing commodities and services for Bexar County;
21. Supervise purchases made using the County purchasing card; and
22. Review and recommend changes to the Auditor regarding purchasing functionality and the County automated financial system.
23. Utilize a bidder list that includes certified vendors (SMWBEs) for a purchase over \$1,000 that is subject to competition and made by the Purchasing Department.
24. Utilize a County automated contract register to record vendor solicitations, responses, and awards for a purchase over \$1,000 that is subject to competition and made by the Purchasing Department.

## **VENDORS AND PROSPECTIVE SUPPLIERS**

### **General**

Bexar County welcomes the opportunity to do business with vendors in the community. The Purchasing Agent is interested in fostering participation by all businesses offering goods and services utilized by the County departments and offices. The Purchasing Agent has the responsibility of making the most economical acquisition of quality goods and services to ensure efficient operation.

### **Specific**

1. Comply with County purchasing policy and procedures in an ethical and fair manner, and not misrepresent facts or circumstances in dealings with Bexar County;
2. Participate in good faith effort to achieve the County goals for SMWBE opportunities;
3. Request clarification, delineation, or explanation of a quote, bid or proposal in writing to the Purchasing Agent or individual specified in the solicitation document when competing for a procurement opportunity;
4. Respond to County requests and solicitations with fair and competitive pricing; and

5. Deliver commodities and services in a timely fashion and in accordance with terms of the contract award.

#### **SECTION 4: STANDARDS**

Civil Practice and Remedies Code §106.001 (Non-Discrimination)  
Government Code Chapter 2254 Subchapters A & B (Professional Services)  
Government Code Chapter 2251 (Prompt Payment)  
Health & Safety Code §361.426 (Recycled Product Preferences)  
Local Government Code Chapter 262 Subchapter C (Competitive Bids)  
Local Government Code Chapter 262 Subchapter B (Public Works)  
Local Government Code Chapter 271 Subchapter C (Certificate of Obligation Act)  
Local Government Code Chapter 271 Subchapter A (Public Finance Act)  
Local Government Code Chapter 271 Subchapter F (Cooperative Purchasing Program)  
Local Government Code Chapter 140.003 (Specialized Local Entities)  
Texas Constitution Article 3 §44

#### **SECTION 5: REFERENCES**

Detailed procedures for applying this policy and applicable forms are found in the Bexar County Purchasing Manual dated October 1, 2004, as amended.