AGENDA

Procurement Innovation Council (PIC)

July 24, 2024 - 1:30 p.m. – 3:00 p.m.

Broward County Governmental Center Building
115 S. Andrews Avenue, Room 430
Fort Lauderdale, FL 33301

1. Call to Order
2. Discuss PIC Operations
3. Introduction to the Plan for Innovation
4. BPRO – New Electronic Procurement System
5. PIC Council Member input/suggestions/topics for future meetings
6. Open Discussion
7. Adjourn

Link to PIC Webpage:
https://www.broward.org/Purchasing/Pages/procurementInnovationCouncil.aspx

Plan for Innovation

Briefed on 3/13/2023

- Procurement Innovation Council (PIC)
- RFP Business Process Re-engineering (BPR)
- Broward Procurement & Surplus Property Manual (BPSPM)
- Broward Certified Contracting Officer (BCCO) Program
- Structured Agency Delegations and Standards
- Vendor Management Office (VMO)
- Broward Vendors Manual
- Broward Certified Vendor (BCV) Program
- Broward Strategic Sourcing Initiative (BSSI)

Purchasing Division, Finance and
Administrative Services Department

Procurement Innovation Council (PIC)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients meet their business mission goals.

What We Do

- Provide the forum to discuss procurement reforms and improvements.
- Enable County offices and key stakeholders to introduce and advance innovative solutions.
- Conduct studies, research, analyses, and make reports and recommendations.

References

Model Procurement Code (ABA)

Model Procurement Regs (ABA)

Future of Procurement (KPMG)

Vision

Advance the vision of Broward County as the nation's best managed county through a transparent, open, and engaged forum of key stakeholder representatives, enabled to drive towards innovative solutions for procurement and commercial management policies and practices, value creation, process efficiencies and effective County business, procurement, and contracting activities.

Mission

The PIC is to serve as a County procurement center of excellence and innovation incubator for County leaders to identify, discuss, and introduce more effective and innovative solutions into government procurement and contract management activities.

Goals / Benefits

Build and improve the supply base, identify, and advance opportunities for greater joint public-private value creation, economic development, cost savings, and better economies of scale and value for money. Leverage opportunities to ensure strategic alignment with County goals, better strategic vendor performance, provide procurement coordination to improve small business goals and opportunities, and better manage risks in procurement and contracts.

Feb 08, 2024

Purchasing Division, Finance and
Administrative Services Department

Request for Proposal Business Process Re-Engineering (RFP-BPR)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients achieve their mission goals.

What We Do

- Map RFP business processes based on current policies and procedures
- Compare County RFP processes to national best practices
- Identify RFP process improvement opportunities
- Implement and/or recommend innovative improvements to all competitive sealed proposal processes

References

Business Process Reengineering (DOD)

Business Process Reengineering Assessment Guide--Ver 3 (GAO)

Reengineering the RFP Process through Knowledge-Based Systems (DTIC)

Business Process Reengineering Framework (State of CA)

Vision

Advance the vision of Broward County as the nation's best managed county, ensuring our procurement procedures facilitate timely, effective acquisition of goods and services to enable the County to achieve its goals and objectives.

Mission

Dramatically improve and innovate source selection methods and processes by simplifying, standardizing, and implementing national best practices for all competitive sealed proposal methods of procurement i.e., RFP, RLI, etc., and align with the ABA Model Procurement Code, universal best practices, and comply with relevant laws and business goals of the County and all using agencies.

Goals / Benefits

- Achieve significant improvements to productivity, quality, cycle time, costs, value, and satisfaction from using agency clients and suppliers
- Substantially improve development, execution, and timeliness for all competitive sealed proposal solicitations
- Improve County reputation and image among all suppliers, with improved numbers of proposals and improved competition

Purchasing Division, Finance and Administrative Services Department

Broward Procurement & Surplus Property Manual (BPSPM)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients meet their business mission goals.

What We Do

- Administer the central procurement system
- Promulgate internal policies and procedures to implement Procurement Code
- Procure or supervise procurement of all goods and services
- Monitor and improve strategic vendor performance
- Ensure delegated authority is performed in accordance with Code requirements and a regulatory framework

References

Global Best Practice (CIPS-NIGP)
Procurement Excellence Criteria (NPI)
Model Procurement Regs (ABA)

Vision

Advance the vision of Broward County as the nation's best managed county, enabled, and exemplified by a comprehensive manual that is continually updated with the most effective and advanced public procurement, contract management, and surplus property policies, practices, and processes.

Mission

Meet County needs through a common operating model to administer and manage an efficient, unified enterprise procurement system to establish high-value contracts to acquire essential governmental goods and services using the most advanced public procurement and commercial management practices to manage County business.

Goals / Benefits

- Unified enterprise standard operating procedures
- Efficiency and consistency in procurement actions
- Maximized value through broad-based competition
- Transparency & uniformity in procurement
- Enablement of innovative commercial practices
- High-quality goods/services at reasonable cost

Ver. Feb 11, 2024

Purchasing Division, Finance and Administrative Services Department

Broward Certified Contracting Officer (BCCO)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients achieve their mission goals.

What We Do

- Professional staff who procure or supervise procurement of all County goods and services
- Promulgate internal policies and procedures to implement the County Procurement Code
- Establish procedures for all tasks relating to contracts IAW terms of the applicable contract
- Ensure all delegated authority is performed IAW instructions and County Code requirements

References

Value of Certification (NASPO)
Why Certify (NIGP)
Procurement Certification Survey Report (ETPA)
Benefits of Hiring a Certified Procurement Pro

Vision

Advance the vision of Broward County as the nation's best managed county, using a strategic focus to develop a professionalized procurement workforce that ensures the central procurement system is directed, administered, managed, and monitored to meet the purposes and intent of the County Procurement Code.

Mission

Develop and enable a trained and high-performing workforce to best meet requirements to implement the Procurement Code and promote its underlying purposes to procure or supervise the procurement of all County goods and services.

Goals / Benefits

- Provides a uniform operating model in the application of contracting business practices.
- Better ensures integrity, fairness, trust, quality, transparency, and leadership across procurement.
- Ensures competition is enabled to the maximum degree practicable.
- Ensures consistent application of procurement rules and policies in an open and transparent manner.

Purchasing Division, Finance and
Administrative Services Department

Vendor Management Office (VMO)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients achieve their mission goals.

What We Do

- Single point of contact for supplier and performance management, and procurement support
- Interface between County offices and vendors, resolve disputes, and coordinate meeting requests
- Help clients with market research, analysis and identify sources and solutions
- Monitor and improve strategic vendor relationships
- Help vendors compete for County business

References

Supplier Relationship Mgt (WorldCC)
Vendor Management Office (GSA)
VMO Roles and Responsibilities
VMO White Paper (Deloitte)

Vision

Advance the vision of Broward County as the nation's best managed county, using a strategic focus to develop a thriving supply base, incentivized to recognize our County as their preferred client of choice to help drive value creation, economic development, and healthier competition to deliver better contracts for all essential needs.

Mission

Develop strategic focus on vendor engagement to improve procurement effectiveness, enable cost savings, and achieve better contract performance. We build supplier relationships to drive joint value creation with improved administrative efficiency, time and cost savings, and better risk management.

Goals / Benefits

- Larger, responsive supply base with opportunities for value creation and economic development.
- Better competition, risk management, cost savings, economies of scale and value for money.
- Influence better vendor quality, performance, and overall participation and coordination opportunities to align with County goals.

Purchasing Division, Finance and Administrative Services Department

Broward Vendors Manual (BVM)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients meet their business mission goals.

What We Do

- Administer the central procurement system
- Promulgate internal policies and procedures to implement Procurement Code
- Supervise procurement of all goods and services
- Monitor and improve strategic vendor performance
- Ensure delegated authority is performed in accordance with delegation instructions and Code requirements

References

Global Best Practice (CIPS-NIGP) Supplier Relationship Mgt (MI)
Supplier Relationship Mgt (WorldCC)
Vendor Management Best Practices

Vision

Advance the vision of Broward County as the nation's best managed county, enabled, and exemplified by a comprehensive vendor's manual that is continually updated with the most advanced, effective public procurement and contract administration policies, practices, and processes to help vendors with County business processes.

Mission

Meet County business needs through a responsive and responsible supply base of vendors – informed on County requirements, standards, and expectations, and then trained and certified to act as part of the unified County enterprise procurement system.

Goals / Benefits

- Unified vendor standard operating procedures
- Consistent, efficient, fair supplier process
- Maximize value through broad-based competition
- Transparency and uniformity in processes
- Continually innovate commercial business practices
- Improve risk management in business processes
- Improve quality and value management

Ver. Feb 25, 2024

Purchasing Division, Finance and
Administrative Services Department

Broward Certified Vendor (BCV) Program

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients achieve their mission goals.

What We Do

- Single point of contact for supplier and performance management, and procurement support
- Interface between County offices and vendors, resolve disputes, and coordinate meeting requests
- Help clients with market research, analysis and identify sources and solutions
- Monitor and improve strategic vendor relationships
- Help vendors compete for County business

References

Vendor Certification Strategies (Harvard)
Future-ready Procurement (Rutgers)
Supplier Code of Conduct (SC Johnson)

Vision

Advance the vision of Broward County as the nation's best managed county, through a thriving supply base, incentivized to recognize the County as their preferred client of choice for mutual value creation, economic health and development, and a stronger, competitive marketplace to better supply essential County needs.

Mission

Develop a broad, effective, strategic supply base to support all County operations through vendors that are trained, certified, and prepared to support needs.

Goals / Benefits

- High-quality suppliers prepared for competition
- Joint opportunities for mutual value creation and greater economic development to align with and help meet County goals
- Better competition, cost savings, economies of scale, and value for taxpayers' money
- Better vendor integrity, quality, preparation, performance, and participation in all opportunities
- Improved risk management, administrative efficiency, time and cost savings, and better contract performance

Purchasing Division, Finance and Administrative Services Department

Broward Strategic Sourcing Initiative (BSSI)

Who We Are

Dedicated public procurement professionals with acquisition and project management experience; helping government and our clients achieve their mission goals.

What We Do

- Analyze market data and usage needs to identify opportunities for value improvements
- Assess and map optimal business models to source key spend categories
- Develop business approaches based on value creation
- Leverage demonstrated best practices in sourcing strategies to benefit the County

References

Guide to Strategic Sourcing (CIPS)
Implementing Strategic Sourcing (White House)
Mapping Effective Sourcing Strategies (CSCMP)
Strategic Sourcing & Category Mgt: The Basics (DOD/OFPP)
Strategic Sourcing in the New Economy (Univ of Tenn - Vested)

Vision

Advance the vision of Broward County as the nation's best managed county, using a strategic sourcing focus to forge more effective partnerships with suppliers, drive value creation, incentivize vendor performance in ways that meet County goals and objectives, and generates healthier competition in the market for goods and services of interest.

Mission

Through a collaborative and systematic process, critically analyze County spend patterns and demand needs to structure optimal sources through high value contract business models to enable timely and efficient delivery of all necessary goods and services.

Goals / Benefits

- Develop high value strategic partnerships with suppliers leading to win-win situations
- Enterprise strategies to improve competition, risk management, create value, improve economies of scale, and improve value for money and savings
- Influence better vendor quality, performance, and overall participation and coordination opportunities to align with County goals

Purchasing Division, Finance and Administrative Services Department

Contract Administration & Management Initiative (CAMI)

Who We Are

Dedicated public procurement professionals with acquisition and contract management experience; helping government and our clients achieve their mission goals.

What We Do

- Promote & support pre-solicitation planning for contract administration
- Deliver training and certification for contract administrators
- Develop and upgrade IT systems used for contract administration & management
- Promote best practices

References

- Contract Administration Best Practices Guide. NASPO (Link)
- Contract and Commercial Management, The Operational Guide. (WorldCC)
- Global Best Practice | Contract Administration (NIGP)
- Relational Contracting (NCMA)

Vision

Advance the vision of Broward County as the nation's best managed county, using best practices in contract management and administration to ensure timely and cost-effective delivery of goods and services needed to fulfill the County's requirements and achieve overall goals and objectives

Mission

Develop and certify a highly trained professional workforce of contract administrators through a clearly defined framework of business contract knowledge, responsibility, and accountability that promotes best practices to ensure a professional approach to administering contracts to provide essential goods and services in an efficient, timely, and cost-effective manner.

Goals / Benefits

- Clear rules of engagement and procedures for both clients and vendors, allowing both to focus on delivery of goods and services per agreed terms.
- Tools and procedures for adjusting contracts to business needs and commercial realities in fair, balanced, and appropriate ways.
- Minimize risks of waste and fraud

June 24, 2024

Broward Procurement & Surplus Manual

Procurement Improvement Council Meeting



Overview

Another Step in Further Strengthening Purchasing Function in Broward, supporting internal clients with value-added service

1. User-Friendly Reference
2. Procurement Practitioners Manual
3. Implementation Guide of existing Policies and Procedures
4. Consolidation of Practitioners instructions and resources in a single document
5. Systematic updates, continually managed by Procurement Division
6. Collaborative with internal and external stakeholders

Table of Contents*

1. Procurement Authority & Responsibility
2. Sources of Supply
3. General Procurement Policies
4. General Procurement Guidelines & Planning
5. Small Purchases
6. Competitive Sealed Bidding
7. Competitive Negotiation
8. Sole Source Procurement
9. Emergency Procurement
10. Contract Administration
11. Appeals & Disputes
12. County, State & Federal Surplus Property
13. FASD/Purchasing Division Support & Assistance
14. Electronic Procurement

*Also includes preface, introduction and index



Manual Development: Process & Approach

- Led and Supported by Professional Practitioners
- Leverage value of leading government models
- Draw upon existing BC procedures & practices…being open to potential improvements aimed at achieving goals/objectives
- Monthly progress meetings, reviews, feedback on draft inputs
- Harmonization with CAPP
- Feedback/suggestions on draft version from Using Agencies
- Finalization, official issuance
- Roll-Out & Training (including certification for internal & agency-based purchasing staff)



THANK YOU!

Do you have any questions?

Welcome

BROWARD COUNTY FLORIDA

BPRO

ELECTRONIC PROCUREMENT SYSTEM

Agenda

- Introduction
- Stakeholders
- Efficiencies
- Training
- Transition

Introduction

The Purchasing Division and Enterprise Technology Services Division is replacing the electronic bidding system, Periscope/BidSync.

The Broward Electronic Procurement System (BPro) will be implemented and integrated with PeopleSoft and OESBD's supplier diversity system, B2G.

Stakeholders

- Purchasing Division
- **Client Agency:**
  CABs, Requesters, Project Managers, OESBD, County Attorney's Office, County Auditor's Office, Risk Management Division, EC members
- Suppliers
- General Public
- Government Agencies (Counties, Municipalities, Constitutional Offices, Educational Institutions)

Efficiencies

- Solicitation Templates based on Procurement Method
- Standard, secure database of template documents
- Real-time collaboration of solicitation drafts and OESBD Sheltered Market Review and Goal Requests
- Concurrent, auditable Approval Workflows
- Real-time EC Scoring and Rating

Training

County Staff: Purchasing, Agency Users, County Attorney's Office, County Auditor's Office, Risk Management Division

Suppliers How to Register and How to Submit

Online BPro Training Modules

Role Specific Training Guide

Transition

Sandbox - Live for County staff training and simulation since January, 2024

Production - Live for Supplier Registration and Training since January, 2024

Production -

Live for County staff Goal Requests and Solicitations planned for August, 2024

Legacy System - Periscope contract expires October 15, 2024

Questions

Thank You

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