



Purchasing Ordinance Revisions

**Purchasing Division
May 27, 2021**

Ordinance/Policies/Procedures



State Statute
55 ILCS
(Counties Code)

Purchasing
Ordinance

Surplus Policy

Responsible
Bidder Policy

Vendor Disclosure
Conflict of Interest
Policy

Procurement Card
Policy

Sustainable
Procurement
Policy

Minority
Contracting
Policy

Strategic Approach

Purchasing
Ordinance Revisions
& Presentation on
JOC Contract

Approval of
Amended
Purchasing
Ordinance

Conduct research on
industry best
practices for
sustainability &
diversity contracting

Present options to
County Board &
develop an
implementation
plan.

Purchasing Ordinance Edits



- **General Provisions**
- **Payment Methods**
- **Competitive Bidding**
- **Professional Services and Competitive Sealed Proposals**
- **Purchases Exempt from Competitive Sealed Bidding**
- **Ethics in Public Purchasing/Contracting**
- **Real Property Leases**

General Provisions

§ 33.003: Public Access to Procurement Documents

- **Strengthen FOIA language to match requirement for vendors to submit redacted copies.**

§ 33.004: Authorization for Budgeted versus Non-Budgeted Purchases

- **Offer a clear distinction on what is a budgeted versus non-budgeted purchase**
- **Clarification on what authorization is needed to proceed with the solicitations. Recommendation is to verify that the necessary funds were appropriated within the County Budget.**
- **For projects not funded as part of the County Budget, expanding the granting authority by adding “and/or” between County Administrator and Director of Finance and Administrative Services.**

§ 33.005: Definitions

- **Suggested edits to definitions for clarification.**
- **Inserted Familial Relationship and Procurement Card**
- **Proposed edit to Responsible Bidder**

§ 33.005: Definitions – Responsible Bidder

- {b} **RESPONSIBLE BIDDER FOR CONSTRUCT/ON CONTRACTS** means a bidder for Public Works construction contracts **over \$30,000** advertised, awarded, and financed, in whole or in part, with county public funds, who meets all of the job specifications, including the following applicable criteria, and submits evidence of such compliance:
- The bidder ~~and all bidder's subcontractors~~ must participate in active apprenticeship and training programs **for at least one of the trades of work contemplated under the awarded contract.** ~~approved and registered with the U.S. Department of Labor's Office of Apprenticeship for each of the trades of work contemplated under the awarded contract.~~

Payment Methods

§ 33.020: General

- Provide parameters of the three payment methods used by Lake County: purchase order, direct voucher, and procurement card.

§ 33.022: Direct Voucher

- Limit the non-negotiable purchases to those that do not require a purchase order or cannot be purchased by procurement card.

§ 33.023: Procurement Card

- Added new section to define the use of a procurement card and connect to the County's Procurement Card Policy.

Competitive Bidding

§ 33.035: General

- Provide direction on spend with a vendor for distinct projects.

§ 33.036: Procedures

- Added Contractor Record Retention for Prevailing Wage jobs.
- Included approval authority for Purchasing Agent for existing software and computer equipment maintenance specifically authorized in the budget.
- Added four additional sections that strengthen existing practices:
 - Multiple Source Contracting
 - Bid Addenda and Questions
 - Communication with Vendors
 - Accepting Single Bid Received

Professional Services & Competitive Sealed Proposals



§ 33.051: Procedures

- Provide direction on spend with a vendor for distinct projects.
- Added two additional sections that strengthen existing practices:
 - Bid Addenda and Questions
 - Communication with Vendors

Purchases Exempt from Competitive Sealed Bidding



§ 33.068– Departmental Procurement

- Redefined small purchase procurement as departmental procurement and provided guidance on procedures

§ 33.060: Grant Programs

- Added new provisions to address grant programs when the County acts as a third-party administrator.

Ethics in Public Purchasing/Contracting



§ 33.133: Employee Conflict of Interest/Bias

- Replaced immediate family with familial relationship to be consistent with policy.

Real Property Leases

§ 33.138– Statement of Policy

- **Inserted new section to clarify internal policy on real property leases consistent with state statute.**

Next Steps

- **Presentation on JOC Contract – May 27, 2021**
- **Discussion on Red-lined Purchasing Ordinance – May 27, 2021**
- **Discussion on Procurement Card Policy – May 27, 2021**
- **Approve Red-lined Purchasing Ordinance – July 13, 2021**

Discussion/Questions

