

How to do Business with San Bernardino County



Purchasing

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Overview

San Bernardino County is the largest county in the continental United States. With a diverse population and sizable geographic area including deserts and mountains, San Bernardino County is tasked with providing a vast amount of services to its citizens. The Purchasing Department is dedicated to assisting County departments provide these services through innovative and streamlined procurement services. The following information will familiarize vendors with how the County purchases goods and services, and how to become aware of County needs and potential business opportunities. The information provided concentrates on the activities of the Purchasing Department.

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Contacting Purchasing

Refer to the Purchasing Department website to determine which buyer is responsible for your category of products or services. Once you have found the buyer that is most applicable to your company, you can make an appointment to discuss your products or services. To assure your appointment with the buyer is productive, bring your company's literature, references, telephone contacts, names of people authorized to sign contracts on your company's behalf, and information on any contracts you have with the federal, state, or other municipal governments. Purchasing is open Monday through Friday, 8 a.m. to 5 p.m. All buyers may also be accessed by email through the Purchasing Department homepage.

Vendor Registration

After you have done the necessary research to determine that the County purchases what you sell and that it is worthwhile for you to become aware of upcoming bids, you need to register as a vendor with the County through the San Bernardino County Procurement System (electronic procurement system). Electronic procurement is an online procurement enterprise system which can notify vendors of upcoming bids via email and can award purchase orders electronically. For more information about registering in electronic procurement, please refer to "New Vendor Registration" on page 5.

Notification of Open Bids

Once you have registered in the electronic procurement system and have met with the appropriate buyer, your next encounter in this process may be when you are notified of a bid. In many cases your company will be notified of an open bid due to the establishment of a bid notification list. If your company has not received notification of a bid opportunity related to your company's production, please check to make sure all the commodity codes have been selected correctly in your company electronic procurement account. Please note that depending on the solicitation vendors may only be notified via email. To ensure a vendor's email address remains up-to-date, electronic procurement will prompt each user to verify their email address when logging in to the system.

To ensure all solicitations remain transparent and fair, all open and recently awarded bids are continuously posted on the San Bernardino County Purchasing Department homepage. Once on the homepage, a user can access all open bids by clicking on the "Bid Opportunities" link located at the top of the page. Awarded bids can also be accessed by clicking on the "Awarded Bids" link. To respond to a bid, your company must be registered in electronic procurement.



New Vendor Registration

Registering with San Bernardino County's Online Procurement System (Electronic Procurement System)

From the Purchasing Department homepage, you can click on "ePro" link located at the top of the page. By following this link you will be directed to the online procurement system (electronic procurement) website <https://epro.sbcounty.gov/bsa/view/login/login.xhtml>

You will need to provide the following information in order to register your company:

- Company Name
- Company Address
- Tax ID
- User Contact Information

If your company has already registered with electronic procurement, then you will be notified that the Federal ID number or social security number already exists within the system upon attempting to register. You may contact the Purchasing Department at (909) 387-2060 for assistance in retrieving your login credentials if you are having difficulty.

Selection of Commodity Codes

When registering, your company will be requested to select commodity codes. Commodity codes categorize the products and services available for business established by the NIGP (National Institute of Government Purchasing). It is the intention of commodity codes to numerically classify all services and products for purposes of streamlining the procurement process. When selecting the commodity codes that reflect the work of your company we encourage you to invest adequate time to include all the codes related to your company. Often solicitations are sent to vendors based solely on commodity codes, therefore if your business is able to do a project but did not select the exact commodity codes regarding the desired service or product, your company will not receive the initial notification. San Bernardino County wants your company to be included in all the solicitations that you are eligible to bid, therefore we encourage you to select all codes that apply. If you are having trouble locating the correct commodity codes for your business, the San Bernardino County Purchasing Department homepage contains a feature which will allow you to search the entire NIGP commodity code database. If you need further assistance in selecting commodity codes, please contact the Purchasing Department at (909) 387-2060. Please remember that the Purchasing Department encourages vendors to frequently check our homepage for open bids as vendors should not solely wait for bid notifications to participate in a bid.

Types of Solicitations

Informal Quotes

Informal quotes are bids used for the purchase of commodities and services under \$100,000. Informal quotes differ from formal bids in that they may be solicited by less formal means such as an internet page, verbally, via email or through the electronic procurement informal quote tool. The informal quote tool is a function in electronic procurement that allows vendors to submit informal quotes to departments requesting a specific commodity or service. Informal quote requests are posted on the Purchasing Department homepage but can only be accessed through electronic procurement. All registered vendors in electronic procurement are allowed to view and respond to open informal quotes if the requested quote corresponds to the vendor's selected commodity codes. In certain circumstances registered vendors in electronic procurement will be notified of an informal quote if the initiating department has specifically chosen them to be notified. Specific instructions for accessing and submitting informal quotes in electronic procurement are provided in the "Accessing Bids and Submitting Responses" section.

Request for Proposal (RFP) and Formal Invitation to Bid (ITB)

Request for proposals and formal invitation to bids are formal written solicitations for a service or commodity, which outline the specific bidding process and contract terms. Typically, these formal bids are issued for the purchase of commodities and services greater than \$100,000, but may be used for procurements under this threshold. These solicitations include precise specifications and requirements that each bidding vendor must meet in order to be considered for the contract. All vendors submitting a response to the solicitation must do so in the manner depicted in the RFP/ITB. Usually this includes exact due dates, possible mandatory pre-bid conference meetings and how the response is formatted. Further information about responding to formal bids is provided in the "Accessing Bids and Submitted Responses" section.

Statement of Qualifications

Statement of qualifications are used to establish a qualified list of vendors to perform a specific service or to provide a complex product such as software. The San Bernardino County Purchasing Department often utilizes this solicitation method for capital improvement and public works projects. Statement of qualifications are similar to formal written bids (RFP/ITB) by requiring each bidding vendor to meet specific requirements and respond to the bid in exact accordance to the statement of qualifications in order to be considered for the contract.

Responding to an Informal Quote

A vendor must be registered in electronic procurement to respond to open informal quotes. To view and respond to a quote, please sign in to electronic procurement. From your welcome screen you can click on the “Quotes” tab located at the left of the screen. After you click on this tab several sub-tabs will appear including a sub-tab labeled “Informal”. Under this tab you will find all current open informal quotes that correspond to your selected commodity codes.

After you have identified a quote you are interested in responding to, you can find additional information about the quote and submit a response by clicking on the “Create” link that corresponds to the open quote. This link will direct you to an informal quote summary page where you will be able to submit pricing for the items being solicited and upload supporting documentation if required to do so. Please carefully read all line item descriptions on this page as they may contain precise requirements for submitting your quote. Please note that after you provide pricing you must click on the “Save & Continue” link to ensure that your quote is submitted. After you click on this link a “Manage Attachments” link will appear at the bottom of this page. You can use this link to upload supporting documentation for your quote. After following this link and uploading your attachments, be sure to click on “Upload Attachments” link at the bottom of the page.

If you are having difficulty in finding or responding to an informal quote, please contact the Purchasing Department at (909) 387-2060.

Responding to a Formal Bid (RFP/ITB)

To respond to a formal bid, please sign in to the electronic procurement system. From your welcome screen you can click on the “Bids” tab found at the top left of your screen. Several categories of bids will appear; please find the bid you are looking for in the “Opened” [Bids] section. If the bid you are looking for is not there, please click on “View More”. If you are still having difficulty locating a particular bid, please contact the Purchasing Department at (909) 387-2060 for assistance.

Once you have located the bid, you may click on the bid number to access the bid summary of information. Please note that when accessing the bid you will be asked to acknowledge the bid and you may receive future correspondence about this solicitation. Once on the bid summary page, please download all attached documentation and carefully review the requirements outlined in the RFP/ITB. This documentation is found under the “File Attachments” section of the bid summary page.

When reviewing the bid documentation, please take note of the submission requirements. Only bids submitted in exact accordance outlined in the RFP/ITB will be accepted. It is very important all vendors interested in a bid understand the submission requirements for each bid as

some will be required to be submitted through the electronic procurement system and others will require a “hard copy” be submitted. Also, some solicitations require a mandatory pre-bid conference or meeting. The purpose of this meeting is to communicate to interested vendors San Bernardino County’s expectations and requirements for the bid, and to confirm the exact bid response process. This meeting allows vendors to ask questions in person and get to know the buyer assigned to the bid. If you fail to appear for a mandatory pre-bid conference or meeting your response to the bid will not be considered.

Purchasing makes certain that vendors are bidding on the same items and in the same units and quantities. Sometimes a bid states “brand name or equal” which means that, if you bid on an item other than the one specified, your item must perform as well as the specified item. The County may request a sample of your item to confirm it meets specifications.

If the RFP/ITB allows for the submission of a quote online, you may respond to the bid through electronic procurement. To do so, please sign in to your electronic procurement account and open the bid you are responding to. Scroll down to the bottom of the page and click on “Create a Quote”. You will be directed to create a “New Quote”. Please complete all the tabs. Only the fields marked with an asterisk (*) are required fields. Be sure to click on “Save & Continue” before clicking on a new tab. You can upload any attachments to the “Attachments” tab. After completing all the tabs, please review the “Summary” tab to ensure your information is correct. You may then click “Submit Quote” at the bottom of the summary tab. **Your quote will not be submitted unless you have clicked “Submit Quote”.**

If you are not sure how to fill in a particular tab, please contact the buyer outlined in the bid summary and/or the RFP/ITB.

Low Value Purchase Orders

Low value purchase orders are used for small procurements of commodities and services that do not exceed \$5,000. All County departments have delegated authority to issue low value purchase orders. In most circumstances the department issuing the purchase order must obtain three quotes (bids) and award to the lowest quote received. Except for developing the procedure for this type of purchase, the Purchasing Department is not involved in this process and does not directly authorize the purchase. To be considered for this type of purchase a potential vendor must directly make themselves known to the department who is issuing the purchase order and by registering in the electronic procurement system. Often departments will use the electronic procurement database of vendors to solicit for a low value purchases.

Procurement Card Purchases (CAL-Card)

County departments have personnel who have been issued “VISA” Procurement Cards, known as CAL-Cards, to procure various materials and supplies. These purchases are treated in the same manner as low value purchase orders. For purchases over \$1,000, County procedures require departments to solicit three bids for each procurement card order. Each individual card carries both a single purchase dollar limit and a monthly dollar limit. To place an order, departments contact the vendor directly. Departments may place orders within their CAL-Card limits, directly with the vendors according to purchasing guidelines. As with low value purchase orders, the Purchasing Department does not directly authorize the purchase.

Standard Purchase Orders

For procurements over \$5,000, an standard purchase order will be issued. Generally, this type of purchase order is used for a one time purchase of a commodity or service. In certain circumstances such as construction, an open market purchase order will be issued along with a separate contract. The purchase order verifies that funds have been approved for this procurement and performance can begin, and the separate contract provides a detailed description of the duties and responsibilities of the vendor and the County. The Purchasing Department authorizes and directly issues all standard purchase orders.

Limit Line Purchase Orders (Blanket)

Blanket purchase orders, also known as Term Contracts, are for the purchase of commodities or services for which estimated quantities have not been established in advanced. Blanket purchase orders are generally used for recurring needs of the County and issued for use by a single department or countywide. In some cases, prefix pricing will be established in the purchase order.

How does the bid evaluation process work?

Depending on the complexity of the bid, it can take from several days to several weeks to evaluate all the bids submitted. For certain evaluations, such as complex services that will be used by multiple departments, evaluation committees may be established to evaluate bid proposals. Typically, evaluation committees will be made up of end users from different departments as well as certain administrative staff. In most cases, Purchasing Department staff will not be part of the committee and will only provide guidance in the bid evaluation process.

The Purchasing Department will award to the lowest responsible and responsive bidder. Please note, however, in many bid evaluations the Purchasing Department will use a “Best Value” evaluation methodology and will take into account many factors other than cost when awarding a contract. Best value evaluations generally include factors such as past work performance, qualifications of staff, and value added services. For a bid with many items, Purchasing, at its discretion, may award the entire contract to one bidder based on comparisons of the aggregate bids, or may make individual line-item awards to the lowest bidders.

Promises of an Award

Because the County relies heavily on competitive bidding, no one knows which bidder will receive an award until sealed bids are opened and evaluated. Therefore, no one can give assurance that a vendor will receive a particular order. County government is also subject to California law regarding conflict of interests, including the receipt of gifts. The County Procurement Code of Ethics Policy expects each employee, at no time or under any circumstances, to accept directly or indirectly, gifts, gratuities, or other things of value in violation of County policy or state law from suppliers, or which might influence or appear to influence procurement decisions.

May I inspect the bids? How do I learn about bid results?

To inquire about bid awards, call the Purchasing contact indicated on the bid documentation at least seven to ten days after the bid opening date. After a bid has been awarded, all supporting documentation including bid tabulations will be available through a Public Records Request. To initiate a Public Records Request, please contact the Purchasing Department at (909) 387-2060.

Where and how do I deliver?

For most orders, the delivery point is the location of the requesting department where the goods or services will be used. You should note carefully the delivery address in the bidding and order documents. You are responsible for delivering to the final destination specified in the order.

Deliveries to County departments typically are made by common carrier, by the vendor, or through the US Postal Service. Do not send the order to the buyer in the Purchasing Department whose name may be on the transaction.

Do I need to include the order number on the outside of the package?

You must include the purchase order number on the outside of the package. This will enable the County to identify the correct department or individual as the recipient in case there are any problems.

When are goods and services considered received by the County?

All goods and services are considered received by the County only after the requesting department inspects the items to be certain all items are received and in good condition, or that the service has been performed satisfactorily. After inspection and any necessary tests have been performed, the department will approve the invoice.

What may delay payment?

Circumstances that may interfere with the County accepting and paying for an order include:

- Short shipment, backorders: The County pays for an order only after all items have been received. Partial payments can be made but must be requested at the time the order is placed. If you have made several shipments to fill an order, and mailed the invoice for the entire order before all shipments were received, you can expect payment only after the County receives the complete order.
- Wrong delivery address: The shipment was sent to Purchasing. Occasionally, vendors send orders to the Purchasing Department instead of the requesting department. This causes delays as Purchasing determines the ultimate recipient and forwards the order. If a purchase order number doesn't appear on the outside of the shipment, Purchasing may be unable to identify the correct department and be forced to return it.

Where do I send invoices?

To expedite payment, send your invoice to the “Bill To” address specified in the order (applicable to purchase orders and blanket purchase orders). For all types of orders, the billing address is that of the County department receiving the goods or services. Include the purchase order number on the invoice. This will help to match the invoice to the correct order.

What does the user department have to do?

The County must verify that the order was received complete and in good condition. The invoice is matched with the original order and any receiving document so the County can determine what was delivered agrees with what was ordered. The receiving department completes a payment document indicating receipt of the complete order and submits it with the invoice to the Auditor/Controller-Recorder for payment.

What happens before payment is issued?

The Auditor/Controller-Recorder reviews the invoice and payment document and then prepares the warrant and mails to the vendor.

What if I have questions about an invoice?

Call the County department you mailed the invoice to. Have the purchase order number or other identifying County transaction numbers available.

What can I do to help the payment process proceed more quickly?

- Verify you sent the shipment to the correct County address. Do not send the shipment to Purchasing. Note carefully the “Deliver To” address on the purchase order.
- Send an invoice for the complete order (unless authorized for partial payments) after the full order has been received. In general, the County does not pay partial invoices without prior arrangements being made. Invoices sent too early may become difficult to locate once the shipment arrives.
- Send the invoice to the “Bill To” address on the purchase order. As many low value purchases are verbal authorizations, vendors are responsible to obtain this information at time of order.
- **Include the correct purchase order number on the invoice.** The County needs the identifying number to match shipments or services with the procurement documents.

Do Not Start Work Without an Authorized Contract

The authority and responsibility of purchasing for the County rests with the Purchasing Department. No service should be provided, and no goods should be delivered, before you receive a written contract or purchase order from the County. Until the County executes a contract, purchase order, or blanket purchase order, the County has no legal obligation to pay for the order. If you begin work without the required authorization, your later options may include taking back your merchandise or filing a claim.

W-9

All vendors being awarded a purchase order or contract must submit a W-9 to the department in charge of the purchase. A W-9 is required so that a vendor can be established in the County's financial enterprise system (SAP). The department requesting the W-9 will have the vendor established in SAP. In order for a vendor to be awarded a purchase order and issued a payment, the vendor must be registered in this system. Failure to submit this document will result in the delay of awarding a purchase order or contract, as well as payment.

Electronic Fund Transfer Program

Many awarded contracts will require the vendor to accept payments from the County via electronic funds transfer (EFT) by having payment directly deposited into the Vendor's designated checking or other bank account. Vendors shall promptly comply with directions and accurately complete forms provided by the County to process EFT payments.

Local Preference

The County has adopted a preference for vendors whose principal place of business is located within the boundaries of the County. A five percent (5%) preference may be applied prior to approval of any purchase or acquisition of services, equipment, goods or supplies. To qualify for this preference, a vendor must meet the local vendor criteria set forth in County Policy 11-10.