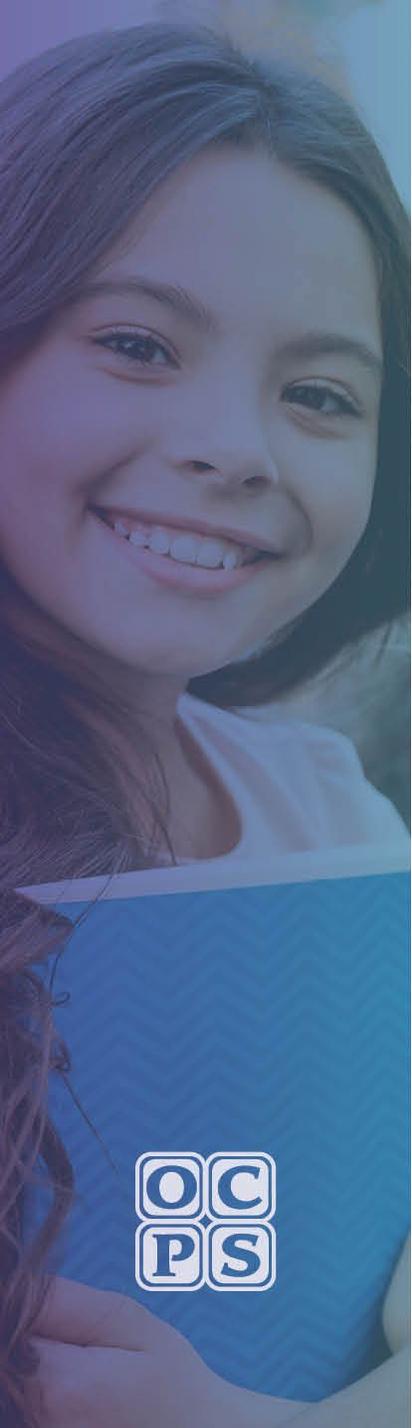




# Best Practices in Procurement

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*October 21, 2022*



# OCPS District Profile

- 4<sup>th</sup> largest district in Florida
- 9<sup>th</sup> largest district in the nation
- 210 schools
- 208,000 students
- 24,000 employees



# Best Practices in Procurement Start with Board Policies

- Clear Delegation of Authority
- OCPS Policy DJA

“(e) Senior Director of Procurement Services.

The Board designates the Procurement Services Department as the Board’s official purchasing agent, and accordingly, authority is delegated to the Senior Director of Procurement Services or designee to:

(i) Determine the appropriate and most cost-effective purchasing method of contract procurement, including competitive solicitations, direct negotiations, and/or methods that allow the Board to take advantage of value discounts and special pricing agreements, where appropriate;”



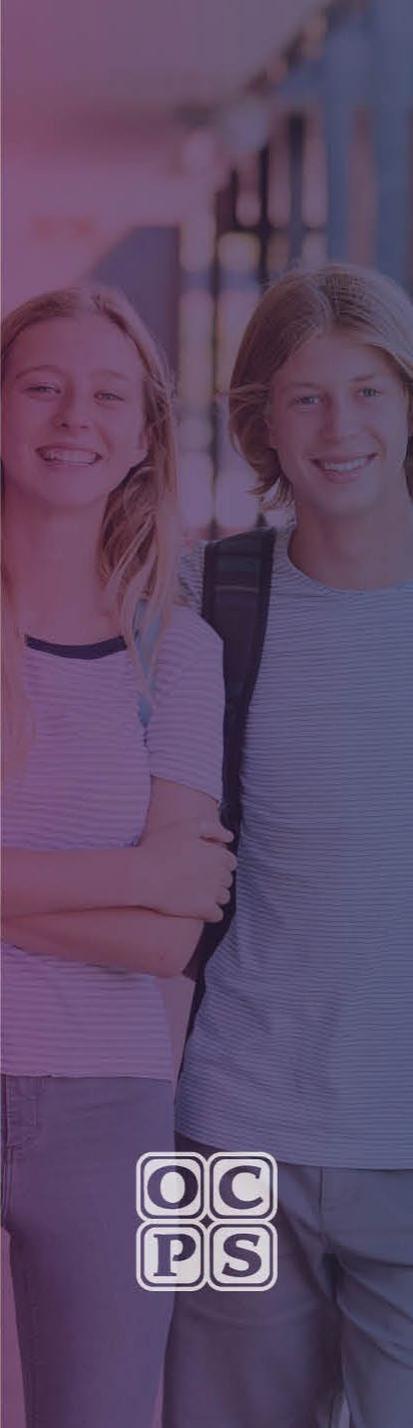
# Recommended Policies

- Policy DJB Purchasing Procedures, KCE Ethics Policy
- “No-Contact Period” shall refer to the period of time between the posting of the contents of a competitive solicitation and the actual award of a contract with regard to that competitive solicitation. All communications regarding the solicitation shall be directed to the designated Procurement Services Department staff member. Any proposer or Lobbyist, as defined in Policy KCE, who violates this provision may cause a proposal to be considered not responsive and, therefore, ineligible for award.



# Procurement Services as Internal Consultant

- Our Approach Solution minded
  - Balance control function with customer service
- Always seek process improvement
- Chief Level Staff should continuously promote the expectation that Procurement Services is consulted first to ensure the best value is achieved and the appropriate contracting method is selected.
- All contracts for the purchase of goods and services should be reviewed and tracked by Procurement Services before being sent to legal or to the School Board for approval.
- Workload intake and tracking should be prioritized so resources are properly allocated and expectations are appropriately set from the start.





# Manage Exemptions from Competition

- Per Board Policy DJB, competition is favored even though a law may allow an exemption. Exempt procurements that exceed fifty thousand dollars (\$50,000.00) shall be subject to the competitive process whenever possible, unless otherwise approved in writing by Procurement Services. Such exemptions shall be submitted as a formal request from the Executive Cabinet member and include a detailed justification for the exemption. The Procurement Services Department may establish procedures that support competitive processes regardless of the exemption status.





# Utilizing Procurement Automations

- When possible use Procurement Automations such as:
  - Electronic Submission of Solicitations
  - Virtual Evaluation Meetings
  - Electronic Scoring
  - Digital signatures for contract execution
  - Auto processing of Purchase Orders
  - Utilization of a P-Card Program



# Procurement Performance Tracking

Procurement Services Scorecard 🏠	FY 20-21 Actuals	YTD 🏠	Jul	Aug	Sept	Oct	N
<b>Spend</b>							
Total PO Spend	\$524,613,423.75	\$228,284,837.5	\$66,501,371.04	\$55,388,719.40	\$49,301,358.76	\$57,093,388.34	
Total PO Spend excluding construction							
Total dollar value of purchasing expenditures for which the Procurement department was responsible (i.e., total procurement outlays), excluding P-Card transactions and construction	\$367,450,084.64	\$144,351,868.2	\$9,048,364.80	\$44,310,066.70	\$37,833,999.66	\$53,159,437.05	
Total Spend on construction							
Total dollar amount paid for/expended to construction contracts	\$161,516,993.39	\$83,932,969.33	\$57,453,006.24	\$11,078,652.70	\$11,467,359.10	\$3,933,951.29	
Total Spend over \$5,000							
Total dollar amount of all fully competitive purchases that were above single-quote limit	\$491,120,476.20	\$218,863,720.9	\$65,077,814.15	\$52,498,013.79	\$46,552,226.69	\$54,735,666.28	
Dollar amount of all sole-source purchases (i.e., not fully competitive) that were above single quote limit	\$1,701,300.61	\$807,971.09	\$72,113.56	\$206,055.25	\$78,605.50	\$451,196.78	
Dollar amount of all emergency purchases (i.e., not fully competitive) that were above the single quote limit	\$636,347.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Dollar amount of other purchases that were not fully competitive and were above the single quote limit	\$90,234,806.30	\$32,104,691.93	\$1,183,790.66	\$9,556,124.60	\$5,927,279.91	\$15,437,496.76	
Total non-competitive spend							
Total district dollars spent during the fiscal year under cooperative agreements, excluding P-card transactions and excluding construction	\$88,808,587.65	\$38,355,052.58	\$3,216,992.95	\$9,912,614.59	\$19,349,997.40	\$5,875,447.64	
Total spend of piggyback and state contract							









# Speaker Bio

- **Robert N. Waremburg, NIGP-CPP, CPPO** serves as Senior Director, Procurement Services for Orange County Public Schools in Orlando Florida. Mr. Waremburg has over 34 years experience leading Procurement departments in four districts across Florida. The OCPS Procurement Department is regularly recognized by the National Procurement Institute and Florida Association of Public Procurement Officials with Awards of Excellence in Public Procurement. When possible and appropriate, Procurement Services enables efficient processing of the purchase orders. Under Mr. Waremburg's leadership, internal controls were established using an e-procurement system known as iBuy, to allow automatic conversion of small, routine purchases from established contracts once the orders are entered into the system, available budgets are confirmed and committed, and necessary staff verify the have completed an administrative review. Orders processed automatically meeting criteria established by the internal system controls represent 25 percent of all of the Purchase Orders processed thereby reducing the administrative processing time. Over the last fiscal year, the district spent over \$68 million in direct spend with small businesses including minority and woman-owned business enterprises (MWBs), local developing businesses (LDBs) and Veteran Owned Business (VBEs). In addition, to the direct spend noted above, Mr. Waremburg also strongly advocates for small business by tracking participation with our construction program where certified small business enterprises receive 26 percent of the value of our construction contracting by serving OCPS both as prime contractors or as subcontractors. Construction contracts awarded for last fiscal year were in excess of \$161 million. Last fiscal year the Procurement Services Department calculated \$42 million in savings through procurement activities and a total of \$200 million in calculated savings for the past five years. Savings achieved through professional procurement activities represents the value the Procurement Department provides to the district by allowing resources that would otherwise have been spent, to be directed to other district priorities. Mr. Waremburg received his Masters of Business Administration for the University of North Florida in Jacksonville, Florida.



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