



# Strategic Procurement Department Business Plan

**Fiscal Years: 2023 and 2024\***  
(10/1/2022 through 9/30/2024)

Approved by:

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Plan Date: July 19, 2023

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# DEPARTMENT OVERVIEW

## Departmental Mission

### Vision Statement

*To be the global leader of purpose-driven procurement*

### Mission Statement

To deliver value and integrate **PURPOSE** in all sourcing decisions by assuring our processes are Equitable to suppliers, sustainable for our Environment, and beneficial to our Economy. We pride ourselves in collaborating with our customers and Engaging our community with integrity, fairness, innovation, competition, efficiency, and transparency.

The department's **Guiding Principles** are aligned with the word "**PURPOSE**":

- Professional service to departments, businesses, and constituents
- Unparalleled model for accountable and transparent governance
- Resilient and adaptive to the evolving needs of our environment
- Promote ethical standards and diverse ideas in our business practices
- Operational efficiencies through use of innovative technology and processes
- Strategic development of talent through training and recognition
- Engagement and inclusion of all stakeholders to promote fair and equitable competition

### Department Overview:

Strategic Procurement Department (SPD) strives to accomplish the mission under the leadership of the Director and Chief Procurement Officer who directs the day-to-day operations of the department and establishes procurement policy and procedures for the County that promotes full and open competition consistent with Federal and state law and the County Code. SPD carries out all roles and responsibilities as stated below through seven core sections: 1) Office of the Director; 2) Goods and Services; 3) Architecture and Engineering; 4) Business Solutions and Public Private Partnerships (P3) Solutions; 5) Vendor Outreach and Support Services; 6) Policy, Training and Compliance; and 7) Administration.

1. Office of the Director provides direction and management of the daily operations of the department; establishes departmental policy, develops and implements countywide procurement policies and procedures, and serves as a strategic partner between departments and suppliers; additionally promotes full and open competition and conducts high level negotiations in the award of County contracts, implements and promotes Information technology procurement system enhancements, prepares agenda packages and implements policies enacted by the Board of County Commissioners.
2. Goods and Services Section is responsible for the procurement of material, equipment, supplies, and services required by County departments. This Section ensures that best value goods and services are acquired according to the County's procurement guidelines from responsible vendors. There are eight distinct commodity teams that handle these procurements:
  - 1) *Technology Team*: Information technology hardware, software, services, and supporting infrastructure to manage and deliver information using voice, data, and video.
  - 2) *Fleet Team*: Goods and services related to automotive, land, water and air transportation.
  - 3) *Transit Team*: Goods and services, professional services and development projects for the Department of Transportation and Public Works.

- 4) *Operations Team*: Operational products and services including animal supplies and services, election supplies, food and catering, security services, uniforms, office resources and contracted employee services.
- 5) *Aviation Team*: Goods and services, including concessions, for the Aviation Department.
- 6) *Facilities Team*: Facility related equipment and services such as building materials and supplies, furniture, garbage and recycling, appliances, building automation, fire suppression, pest control, and HVAC.
- 7) *Environmental Team*: Biotic products and services such as chemicals, air emissions, refrigerant gases, as well as plumbing supplies, debris removal and construction equipment rental, land leases, and landscape supplies and services.
- 8) *Administrative Team*: Marketing, insurance brokerage, financial management, employee benefits, accounting services, debt collection, property leases and medical equipment supplies and services.

3. Architecture and Engineering Section is responsible for the procurement of architectural, engineering, landscape architecture, land surveying and mapping services, including design-build services in accordance with Florida Statutes 287.055 the Consultants' Competitive Negotiation Act, and the guidelines established by Administrative Order 3-39 Standard Process for Construction Contracting, Acquisition of Professional Services, Change Orders and Reporting. All County departments' professional services are procured through this Section which is also charged with the administration of the County's Prequalification and Technical Certification Programs.

4. Business Solutions and P3 Solutions Section has two distinct teams. The Business Solutions Team is responsible for the development and support of all procurement systems that manage the vendor registration process, coordinate departmental operations and functions, and conduct procurement systems training. The Team supports recently implemented INFORMS and other legacy systems needed for SPD operations; liaisons with the Information Technology Department, reviews existing business processes and identifies technical solutions to improve or implement management directives.

The P3 Solutions Team provides guidance on Countywide procurement policy for user departments and SPD staff across all aspects of procurement. This Team manages the County's unsolicited proposal process and the subsequent competitive process that may result. The Team advances innovative procurement models to find a solution to complex needs, such as leveraging private companies to partner with the County to address development and construction projects through a lease and/or design, build, finance, operate and maintain contract.

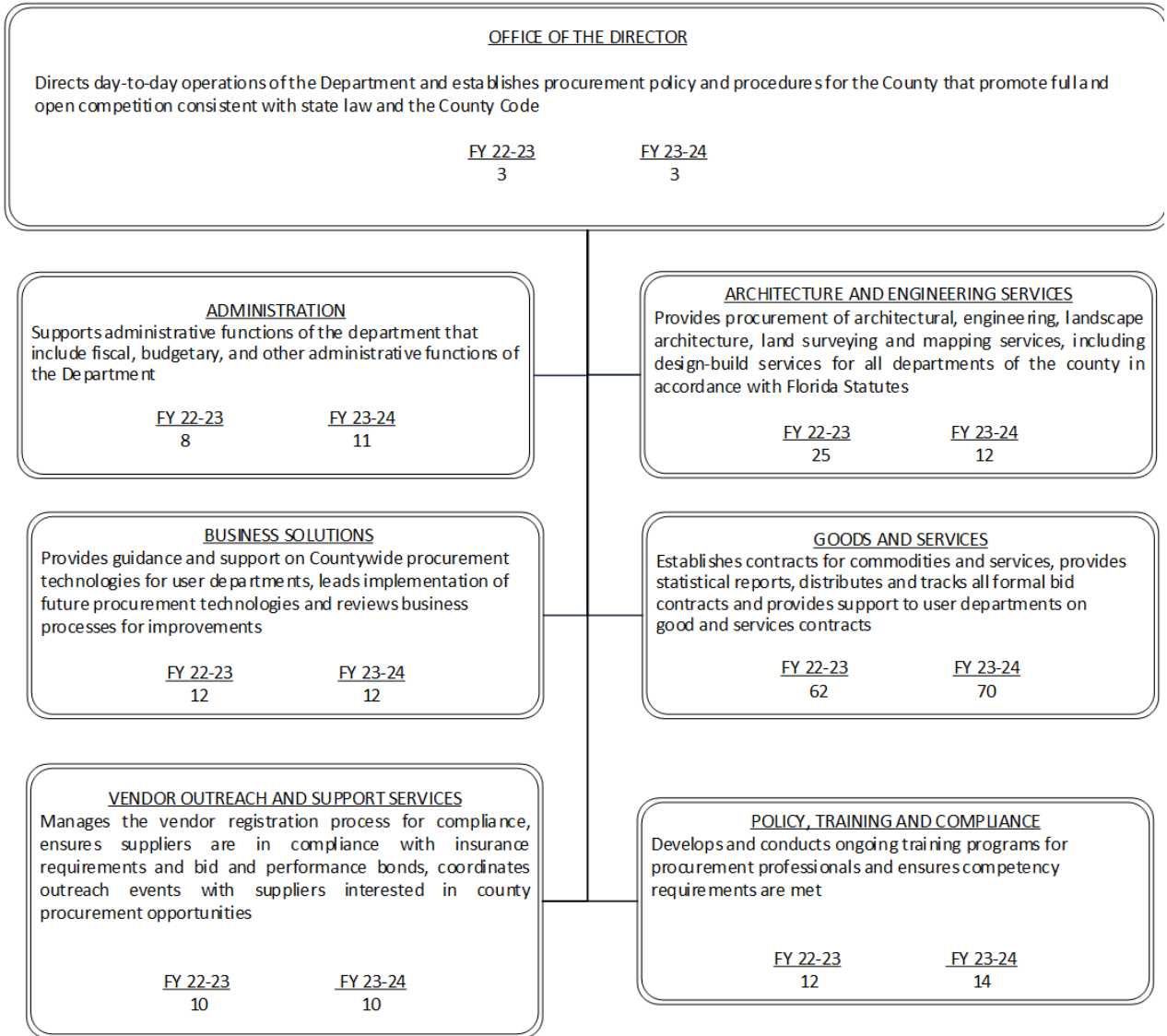
5. Vendor Outreach and Support Services Section manages the vendor registration process and conducting vendor outreach events. The section is responsible for quality assurance for procurement activities; inventory and management of capital equipment and office supplies, document retention process of actively awarded contracts; compliance with insurance, bid and performance bonds; oversee record management functions; and assist and coordinate public record requests.

6. Policy, Training and Compliance Section manages business process design changes due to Integrated Financial Resources Management System (INFORMS) and provides ongoing training to SPD staff, department procurement staff, and stakeholders through the Procurement Academy. The Section performs updates to user manuals and guidelines on procurement processes and procedures; and automation of procurement actions, systems, and submittal forms; manages and coordinates Mayoral initiatives for strategic and innovative approaches to deploying emergent industry best practices in the acquisition of large-scale countywide projects. The Section also serves as the department's agenda coordinator, and technical

advisor on policies and procedures, newly approved legislation and its legal interpretations, appropriate use of specifications and the structuring/re-structuring of solicitations.

7. General Administration Section is responsible to plan, direct, and coordinate departmental policies, functions and operations; fiscal management; budget development, capital inventory and supplies. This team will process all personnel matters, assess staffing needs, recruitment, payroll, compensation, and terminations; maintain budgetary review and exercise fiscal control over revenues and expenditures; monitor compliance with the User Access Program; coordinate records management/storage and departmental audits; and develop, implement, and monitor strategic planning initiatives and performance measures.

**Table of Organization**



The FY 2023-24 total number of full-time equivalent positions is 132

## **Our Customer**

SPD serves a wide range of internal and external stakeholders, including County departments and employees, municipalities, the business community, and County residents. County departments depend on SPD to establish contracts and pools for the procurement of goods and services to carry out their departmental missions. Staff in each of those departments rely on SPD staff to assist in navigating the complex and evolving procurement laws and procedures. Our customers expect excellent service in resolving contractual issues, providing guidance, training and oversight while responding to their needs in a timely manner to ensure uninterrupted delivery of essential services to the residents and visitors within Miami-Dade County.

SPD continuously provides training on policies and procedures to ensure that other county departments can continue to seamlessly deliver services to their customers. SPD launched the Procurement Academy to provide training Countywide to equip staff with the knowledge and skills to perform procurement and related functions. The Procurement Academy focuses on staff development and the promotion of ethical behavior, efficiency, effectiveness, equity, economy and responsible stewardship of County resources in all procurement activities. SPD also launched the Vendor Academy, a targeted educational platform where vendors can learn about the County's procurement opportunities, processes, and programs. The Vendor Academy offers free virtual instructor-led procurement workshops, monthly vendor onboarding and forum sessions, in-person and virtual commission district vendor workshops and outreach events, training videos and vendor registration bootcamps with the goal of enhancing vendor participation in the County's contracting opportunities. This data will serve as a guide to determine and shape the core business services and the quality of these services.

Thirteen of the larger departments who are served by SPD include: 1) Aviation, 2) Community Action and Human Services, 3) Corrections and Rehabilitation, 4) Fire Rescue, 5) Information Technology, 6) Internal Services, 7) Parks, Recreation and Open Spaces, 8) Police, 9) Public Housing and Community Development (PHCD), 10) Seaport, 11) Solid Waste, 12) Transportation and Public Works and 13) Water and Sewer. As we continue to rebound from COVID-19 pandemic, so do our customers. During the Pandemic, customers like Aviation and Seaport had put off significant capital improvements and repair projects for various reasons. As the economy recovers, they are handling record number of passengers. Their needs have significantly increased, emphasizing the need and expediency for their purchases. To meet their needs and align efficiencies, SPD regularly holds monthly status meetings with many of the departments to ensure the departments stay committed to moving priority projects through the procurement process.

The commitment remains high to provide affordable housing to County's residents. In an effort to assist with this initiative, SPD has committed to process numerous solicitations in an expedited manner to assist PHCD in providing services such as mortgage relief and weatherization assistance. Additionally, SPD remains committed to the full implementation of County's INFORMS system. Staff attend weekly meetings to provide feedback on functional aspects as well as processing of contractual modifications and negotiations to complete the implementation and the acceptance of this critical system.

## **Strategic Alignment Summary**

SPD, as the central agency for the procurement of goods and services for Miami-Dade County government, through the implementation of the Purpose-Driven Procurement Administrative Order and associated procurement process checklist which serves as a guide in achieving the Mayor's 4Es of equity, engagement, environment and economy, and supporting the Mayor's priorities for sustainable practices.

- 1) **Equity:** To promote equity and fairness for all suppliers and conduct the procurement process in an impartial, consistent, reliable and ethical manner. Concurrently, SPD shall bolster contracting opportunities for small and local businesses.
- 2) **Engagement:** To encourage inclusion of all stakeholders in the procurement process thereby promoting diverse ideas, and accountable and transparent governance.
- 3) **Environment:** To ensure a well-managed built and natural environment that is resilient to climate stressors through the purchase of environmentally preferred products and services. SPD will work with departments to purchase products and services that reduce greenhouse gas emissions to combat climate change; decrease the use of hazardous materials to improve community and environmental health; facilitate waste management; consider sea level rise for infrastructure projects; and increase the efficiency and effectiveness of the County's resources consumption.
- 4) **Economy:** To encourage small and local businesses to participate in the County's contracting opportunities, increase product and service offerings by reviewing work needed to consider breaking it into smaller scopes. SPD shall leverage the County's purchasing power, using public procurement as a national economic driver to stimulate and contribute to the growth of the County's economy.

SPD has included language in the solicitation templates to request proposers' sustainable practices to address the three pillars of sustainability: environmental, social/fair labor standards and economic, as it relates to the goods and services being procured.

As an example, when addressing *environmental*, proposers are asked to explain how they will perform the work required by using durable products, reusable products and products that contain the maximum level of post-consumer waste, post-industrial and/or recyclable content, without significantly affecting the intended use of the goods or services required.

As an example when addressing *social/fair labor standards* which contribute to the health, well-being, and development of its employees, including individuals with disabilities and neurodivergent persons, proposers are asked to describe their efforts in support of safe, fair, and equitable work practices and ethical behavior, to include job classification descriptions of any and all services to be performed; geographic area within which the services are to be performed, under safe and accessible working conditions; equitable wage/benefit determination practices; and, documentation on employee development and evaluation process. Proposers are also asked to describe their plan to actively recruit Neurodivergent talent and individuals with disabilities for employment opportunities, including social and equitable fair labor standards which contribute to the development of proposer's workforce and employees' well-being.

As an example when addressing *economic*, with the intent to give equal access to small, diverse and disadvantaged suppliers, the proposer is asked to identify their direct efforts to develop supplier diversity initiatives used to increase the participation of small, diverse and disadvantaged enterprises, in contracting opportunities.



**SPD supports the Miami-Dade County Strategic Plan under the Economic Development strategic area by focusing on the following goals and key performance indicators (KPI):**

- **ED2 - Entrepreneurial Development Opportunities within Miami-Dade County - Through the Department's Divisions.**
  - ED2-1 - Encourage a dynamic and healthy small business community that reflects our diversity
  - ED2-2 - Bolster opportunities for small and local businesses to participate in County contracting
    - *Number of contracts awarded to certified SBEs and local enterprises.*
    - *Percentage of small or local businesses added to prequalification pools.*
    - *Number of vendor trainings and outreach events to promote contracting opportunities.*

**SPD supports the Miami-Dade County Strategic Plan under the General Government strategic area by focusing on the following goals:**

- **GG1 – Accessible, Equitable, Transparent, and Responsible Government**
  - GG1-4 – Promote equity in the planning and delivery of County Services
    - *Number of new vendors registered with the County.*
    - *Percentage of competitive goods and services contracts based on dollar value.*
- **GG2 - Excellent, engaged and resilient workforce - Through the Department's Divisions:**
  - GG2-2 - Promote employee development and leadership.
    - *Number of trainings facilitated by SPD to promote employee development.*
- **GG3 - Optimal internal Miami-Dade County operations and service delivery**
  - GG3-3 - Ensure procurement of goods and services is timely, meets operational needs, and is conducted in a fair and transparent manner.
    - *Average number of days to award competitive goods and services contracts up to \$1M*
    - *Average number of days to award competitive goods and services contracts above \$1M*
    - *Average number of days to award architectural and engineering (A&E) contracts*
    - *Average number of days to award design build contracts*
    - *Average hold time (seconds) for calls handled by the INFORMS Strategic Sourcing Help Desk*
    - *Percentage of abandoned Help Desk calls*

**4Es, and Thrive305 Summary**

Selected Measure Name	4E (Environment/ Equity/Economy/ Engagement)	Thrive 305 Priority / Action
Number of contracts awarded to certified small business enterprises and local businesses	Economy	Action 5.1
Percentage of small or local businesses added to pre-qualification pools	Economy	Action 5.1
Number of vendor trainings and outreach events to promote contracting opportunities	Economy	Action 5.4
Number of new vendors registered with the County	Equity	Action 5.2
Percentage of competitive goods and services contracts based on dollar value	Equity	Action 5.1
Number of trainings facilitated by SPD to promote employee development	Engagement	Action 12.2
Average number of days to award competitive goods and services contracts up to \$1M	Engagement	Action 5.1
Average number of days to award competitive goods and services contracts over \$1M	Engagement	Action 5.1
Average number of days to award architectural and engineering contracts	Engagement	Action 5.1
Average number of days to award design build contracts	Engagement	Action 5.1
Average hold time (seconds) for calls handled by the INFORMS Strategic Sourcing Help Desk	Engagement	Action 2.1
Percentage of abandoned Help Desk calls	Engagement	Action 12.1

**KEY ISSUES**

SPD’s senior leadership utilized the Strengths, Opportunities, Aspirations and Results (SOAR) strategic planning framework and has collaboratively identified the results as illustrated by the below SOAR analysis matrix. SOAR is a strategic planning framework with an approach that focuses on strengths and seeks to understand the whole system by including the voices of the relevant stakeholders. SOAR is a positive approach to strategic thinking and planning that allows SPD to construct its future through collaboration, shared understanding, and a commitment to action. The conversations centered on what SPD is doing right, what can be improved, and what is most important to stakeholders in the department's success. The analysis is flexible and scalable and will be used to explore new initiatives, enhance SPD’s strategic plan and perform annual strategic assessments. The results will also be used as part of the staff development program and in the career development of individual employees.

<b>STRENGTHS</b>	<b>OPPORTUNITIES</b>
<ul style="list-style-type: none"> <li>• Strong leadership and integrity</li> <li>• Clear Mission Statement and guiding Principles</li> <li>• Highly skilled and dedicated employees with diverse expertise</li> <li>• Collaboration with customers, partners, and stakeholders</li> <li>• Professional development training</li> <li>• Excellent customer service culture</li> <li>• Promotion of small business inclusion in County contracting and the growth of the small business community</li> <li>• Employee morale and satisfaction</li> <li>• Increased local vendor participation</li> <li>• Documented and proven public procurement processes and best practices</li> <li>• Solution oriented to include development of alternative methods when necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Benchmarking with other agencies for best practices</li> <li>• Partner with Human Resources Department to improve recruitment and retention initiatives</li> <li>• Delegation of authority for increased procurement efficiency/processing time</li> <li>• Continued business process re-engineering to align with INFORMS</li> <li>• Succession planning and staff mentoring</li> <li>• Upgrade legacy procurement technology tools and integrate with INFORMS</li> </ul>

<b>ASPIRATIONS</b>	<b>RESULTS</b>
<ul style="list-style-type: none"> <li>• Improve government efficiency</li> <li>• Streamlined legislative requirements in procurement</li> <li>• Updated technology tools</li> <li>• Attract and retain excellent employees</li> <li>• Complete projects ahead of schedule</li> <li>• Countywide procurement training for all departments and vendors</li> <li>• Demonstrate SPD's positive impact on the community</li> <li>• Enhanced Customer Service</li> <li>• Staff cross-training</li> <li>• Enhance capability to use alternative models such as P3 and to process unsolicited proposals</li> <li>• Attract more local and small businesses to participate in County procurements</li> <li>• Create greater economic opportunities for residents and small businesses</li> <li>• Enforce a sustainable approach to labor practices</li> <li>• Build a fully automated solution for all repeating procurement tasks integrated with INFORMS</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing Web-based Key Performance Indicators</li> <li>• Follow project management methodology to plan, execute, monitor and measure, and optimize.</li> <li>• Analyzing the metrics and taking corrective actions on a recurring basis</li> <li>• Internal/External Stakeholder Surveys</li> <li>• Number of filled positions</li> <li>• Satisfied Customers</li> <li>• Improved employee retention rates</li> <li>• Improved strategic procurement planning through collaboration with departments</li> <li>• Outcomes based on efficiency</li> <li>• Recognized as a leader by presenting at local, state and national training opportunities or educational conferences for procurement professionals</li> <li>• Communication of SPD successes and achievements</li> <li>• Recognized for organizational excellence in public procurement</li> </ul>

## PRIORITY INITIATIVES

SPD will continue to focus on procurement reform and enhancements through the following priority initiatives identified by senior leadership in support of the County’s strategic goals. These key issues will be addressed in the current and upcoming fiscal years that are reflected in SPD’s budget submission: SPD will focus on the following broad categories covering multiple areas of procurement. Integral to analyzing progress is the need to have a robust technology system that is seamlessly integrated with the business rules and has the ability to capture, analyze, and report on all KPIs.

The eight key initiatives are as follows:

1. Strategic Business Management
2. Vendor Engagement
  - a. Vendor Academy
  - b. Vendor Performance Management
  - c. Vendor Risk Management
3. Collaborations / Partnerships
4. Enhancements to Prequalification Pools
5. Streamline Legislative Requirements and Processes
6. Purpose Driven Procurement
7. Sustainable Procurement
8. Staff Recruitment, Development, Retention and Succession

The below table denotes the Priority Initiatives and Aspirations which will be accomplished by the Department:

<b>Key Initiatives</b>	
<p>1</p> <p><b>Strategic Business Management</b></p> <ul style="list-style-type: none"> <li>• Improve government efficiency</li> <li>• Updated technology tools</li> <li>• Build a fully automated solution for all repeating procurement tasks integrated with INFORMS</li> </ul>	<p>INFORMS system went live in April 2021, streamlining business processes and replacing existing technology tools to help the County evolve into a strategic organization. SPD managed the implementation of the entire suite of supply chain modules, including strategic sourcing, supplier contracts, vendor portal, eProcurement and purchasing, which will streamline County’s procurement activities in all departments. Stabilizing the implementation of INFORMS is a substantial challenge Strategic sourcing will be available to hundreds of Buyers and department-based procurement staff countywide, as well as thousands of vendors, and it will require extensive support and assistance. Sourcing events are time sensitive and subject to bid protests and other risks if timely support is not provided to the vendor community as proposals are being uploaded across many different time zones.</p> <p>That support will be replaced by SPD staff. Resources must be hired, trained, and ready to support the vendors and County departments. The priorities are to a) launch INFORMS Customer Service Team for internal and external stakeholders; b) work with departments for use of Strategic Sourcing module for bidding under pools; and c) work with Small Business Development Division of ISD and other County departments for use of Strategic Sourcing for construction bids.</p> <p>Several key components of INFORMS could not be implemented with the original roll out due to time and resource constraints. These components are needed, they require skilled resources from the technical and functional teams so that our technology continues to align with the mission of our department. The following supply chain management functionalities will be implemented as resources become available:</p>

		<ul style="list-style-type: none"> <li>a) Supplier Scorecard in INFORMS, to track vendor performance;</li> <li>b) Integration of Insurance transmittal functionality with INFORMS;</li> <li>c) Comprehensive reporting mechanism in INFORMS that includes historical data;</li> <li>d) Requisition processing across all Business Units to effectively utilize Strategic Sourcing;</li> <li>e) Build Clause Library to effectively utilize Supplier Contracts module;</li> <li>f) Integrate Contract Modification and Option to Renew functionality in INFORMS</li> </ul> <p>In addition, the following technology projects will be addressed during this plan period.</p> <ul style="list-style-type: none"> <li>a) Integration between INFORMS vendors and PQC/technical certification module of Project Administration (PA) system;</li> <li>b) Automate the A&amp;E modules for transaction processing in PA;</li> <li>c) Migrate historical data from A&amp;E and Design Build projects into Documentum;</li> <li>d) Migrate historical Awarded County Contracts from legacy portal to INFORMS portal;</li> <li>e) Implement Monday.com for operational management of repeatable tasks;</li> </ul> <p>Upgrade Bid Tracking System – Information Technology Department (ITD) has advised that Microsoft no longer supports this version of dotnet framework. This task is dependent on availability of ITD resource.</p>
2	<p><b>Vendor Engagement – Vendor Academy;</b> Countywide procurement training for all departments and vendors</p> <ul style="list-style-type: none"> <li>• Demonstrate SPD’s positive impact on the community.</li> <li>• Attract more local and small businesses to participate in County procurement</li> <li>• Create greater economic opportunities for residents and small businesses.</li> </ul>	<p><b>Vendor Academy</b> SPD will administer surveys to seek vendor feedback and gauge satisfaction. SPD will also work with the County’s new Office of Equity and Inclusion to launch the formal Vendor Academy to include:</p> <ul style="list-style-type: none"> <li>• Free workshops and trainings (virtual and in-person as needed)</li> <li>• Website Update</li> <li>• Monthly Onboarding of Suppliers</li> <li>• Monthly Supplier Forum for Problem Solving and strengthening the relationships with local businesses</li> <li>• Launch YouTube Videos in English/Spanish/Creole which can be conveniently viewed by start-up businesses, or any business wanting to do business with the County. These videos will cover the same topics provided in the virtual workshops.</li> <li>• Annual Procurement Exposition with the goal of creating opportunities for local vendors to meet and talk to other County Departments, and sister cities/universities/ educational institutions and organizations regarding pools, contracts and upcoming projects.</li> <li>• Commission District Vendor Workshops: Schedule in-person or virtual vendor workshops for each Commission district.</li> <li>• Vendor Registration Bootcamps</li> <li>• Develop social media presence strategy</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Vendor Performance Management</b> ; Enhanced Customer Service</li> <li>• Improve government efficiency.</li> <li>• Updated technology tools</li> </ul> <p><b>Vendor Risk Management</b></p> <ul style="list-style-type: none"> <li>• Improve government efficiency.</li> </ul> <p>Updated technology tools</p>	<p><b>Vendor Performance Management</b>  Currently, there is no repository/database to track performance of vendors for goods and services contracts  a) Launch Vendor Performance Management module in INFORMS.  b) Develop policies, procedures, and templates for departments and an Administrative Order  c) Trainings  d) Implement post-bid conferences with County vendors</p> <p><b>Vendor Risk Management</b>  A Countywide systematic approach to assessing risks prior to the award and during the term of the contract will allow the County to make better decisions. SPD will draft a Countywide policy, administrative order, develop and share guidance documents including checklists and processes and provide the required trainings. The roles of Finance and Information Technology departments will need to be clearly defined, and a Request for Proposal to find the right software will be developed, evaluated and awarded.</p>
3	<p><b>Collaborations/ Partnerships</b></p> <ul style="list-style-type: none"> <li>• Staff cross-training</li> <li>• Enhanced Customer Service</li> <li>• Attract more local and small businesses to participate in County procurements.</li> <li>• Create greater economic opportunities for residents and small businesses.</li> <li>• Enforce a sustainable approach to labor practices.</li> </ul>	<ul style="list-style-type: none"> <li>• Implement a Procurement Report Card, to gather feedback from all County departments and implement changes to address concerns and issues raised. A systematic approach to surveying, analyzing, and measuring customer feedback will be needed.</li> <li>• Launch the Procurement Training Academy to focus on staff development within SPD and across all County departments.</li> <li>• Launch a Quarterly Newsletter highlighting upcoming solicitations, awarded large complex contracts, introduce the procurement team by commodity, and other relevant information – to inform and communicate with all departments.</li> <li>• Hold monthly/quarterly meetings to collaboration with County departments to include meetings with Directors, and departmental procurement Staff to improve acquisition planning by utilizing the 18-month re-procurement process start mandate (24 months for larger/complex solicitations)</li> <li>• SPD will work with the South Florida Anchor Alliance members to market, promote and manage the regional Market Place. The partnership will include goods and services, design build, architectural and engineering, construction, and miscellaneous solicitations in the Regional Market in a phased approach.</li> </ul>
4	<p><b>Enhancements to Pre-Qualification Pools</b></p> <ul style="list-style-type: none"> <li>• Improve government efficiency.</li> <li>• Create greater economic opportunities for residents and small businesses.</li> </ul>	<ul style="list-style-type: none"> <li>• <u>Set-Aside Pools for Local Vendors and Set-Aside Pools for Small Vendors</u>: For certain commodities, with enough small and local vendor participation, Pools can be set-aside exclusively for small and/or local vendors. These set-aside pools may further enhance contracting opportunities for small and local businesses while allowing the County to re-invest in the local economy. SPD will work with the Beacon Council</li> <li>• <u>Extend Successful Pools</u>: For those Pools that are functioning as intended, we can request Board authorization to extend the pool term. Longer-standing Pools have a larger number of prequalified vendors, which increases competition and reduces the paperwork that vendors have to complete to qualify when Pools are re-established.</li> <li>• <u>Establish new Pre-Qualification Pools</u> for longer periods up to 10 years, subject</li> </ul>

	<ul style="list-style-type: none"> <li>• Demonstrate SPD's positive impact on the community.</li> <li>• Enhanced Customer Service</li> </ul>	<p>to Board approval. A longer term allows for retention of well performing vendors and reduces the frequency of submission of paperwork as required with every new pool.</p> <ul style="list-style-type: none"> <li>• <u>Establish Pre-Qualification Pool Program for Goods and Services.</u> The existing Miscellaneous Construction Contract (MCC) Program has proven to be successful in providing small contracting opportunities to SBE certified firms while providing excellent value to the County. A program for goods and services similar to the MCC Program may provide additional contracting opportunities to local and small businesses. Legislation would be required to establish a Goods and Services Pool Program. Certain exceptions will need to be carved out.</li> <li>• <u>Janitorial and Landscaping Pool Program.</u> Ordinance recently created Section 2-8.2.7.02 of the Code creating the Program providing for County purchases of janitorial and landscaping services from vendor pools consisting of firms certified as small business enterprise-services; establishing procedures for establishing purchasing program pools and limitations as to the terms and dollar amounts of the pools. We are in the process of creating program solicitation documents and notices on our website to invite the certified small business enterprise firms to participate. The goal, if this program is successful, is to have to program be perpetual and seek funding from the Board on an as needed basis.</li> </ul>
5	<p><b>Streamline Legislative Requirements and Processes</b></p> <ul style="list-style-type: none"> <li>• Improve government efficiency</li> <li>• Streamline legislative requirements in procurement</li> <li>• Complete projects ahead of schedule</li> <li>• Demonstrate SPD's positive impact on the community</li> <li>• Create greater economic opportunities for residents and small businesses</li> <li>• Enforce a sustainable approach to labor practices</li> </ul>	<ul style="list-style-type: none"> <li>• Revisions to IO 3-21 – Protests</li> <li>• Implementing Order 3-34 (Formation and Performance of Competitive Selection Committees): The revised IO will address concerns and also ensures accountability, enhances transparency and affords an opportunity to deal with any scoring anomalies/variations.</li> <li>• Review Implementing Order 3-35 (Purchasing Card Program) to see if there is a business case justifying use of P-Cards for all transactions up to SPO threshold (\$25,000). Currently, the use of P-Card is limited to \$500 per transaction. Increasing the limit will result in rebates to the County through the P-Card Program.</li> <li>• Revision to Master Procurement Implementing Order 3-38</li> <li>• Revisions to Administrative Order 3-39 (Standard process for construction of Capital improvements, acquisition of professional services, construction contracting, change orders and reporting) The administrative order has been revised to incorporate: <ul style="list-style-type: none"> <li>a) Changes recommended by Task Force for A&amp;E Solicitation Process</li> <li>b) Changes to Design-Build Process thereby incorporating several enhancements, innovations, and elimination of unnecessary requirements. When presented to the Board this will be a significant improvement from our current practices.</li> </ul> </li> <li>• Work with Commissioners on various legislative initiatives: <ul style="list-style-type: none"> <li>a) Living Wage Expansion</li> <li>b) Delegation of Authority</li> <li>c) Streamlining of Selection Committee Appointments</li> <li>d) Streamlining of procurement process</li> <li>e) Standardization of A&amp;E and DB processes</li> </ul> </li> <li>• Work with all County departments and Office of Resilience to promote adoption of Green/ Environmentally Friendly/Sustainable Procurement” methods and implement procedures to track.</li> <li>• Establish new cycles times upon implementation and stabilization of INFORMS. Focus on reducing cycle times.</li> <li>• Establish a dedicated INFORM Customer Service Team to provide assistance to vendors and departments.</li> <li>• Update manuals and guidelines on procurement processes and procedures in parallel with INFORM Implementation.</li> </ul>

		<ul style="list-style-type: none"> <li>Automation of procurement actions and systems (memoranda and award form) which are now generated through PA. Award modifications and optional terms memos under delegated authority are created based on Word templates. Currently working with ERP SME on submittal form automation, as well as minimizing number of submittal forms for inclusion within INFORMS.</li> <li>Streamline Board of County Commissioners Agenda process.</li> <li>As part of the updating of IO 3-38 (Procurement), review language that requires the annual completion of Online/On-Demand Procurement Essentials and Annual Re-Fresher Courses (consistent with ITD's Security Annual Refresher and Essentials Online Courses). These courses should be required of all professional purchasing/procurement positions throughout the County. Will recommend that Appendix F in the County's Pay Plan be used to identify required positions.</li> <li>Improve the overall timeliness of the procurement process and enhance our customer service. Due to COVID-19 our measures may be affected, however, the department continues to work to enhance customer service. A new customer satisfaction survey was developed and will be implemented via Survey Monkey. The first Procurement Report Card Survey findings should provide greater insight into specific areas where targeted efforts can be pursued.</li> <li>Use of Monday.com to track procurement timelines for selection committee procurements, bids, non-competitive procurements.</li> <li>Review Section 2-11.1, Conflict of Interest and Code of Ethics Ordinance: Work with Office of Inspector General and Commission on Ethics to recommend changes with regards to Cone of Silence, Lobbying and Conflict of Interest.</li> <li>Conflict of Interest and Neutrality Affidavits for Selection Committee members</li> <li>Simplify formation of Selection Committees: The current process is managed by Small Business Division and can be simplified further for expediency.</li> <li>Research and implement alternate scoring methods for evaluation of goods and services.</li> <li>Implement real-time management and tracking solution.</li> <li>Standardization of procurement legislation to ensure terms, values, and timing are easily referenced to increase transparency and improve the public's understanding of agenda items and the overall procurement process.</li> <li>Implement tracking methods and delivery timelines to monitor progress for countywide signature projects.</li> </ul>
6	<p><b>Purpose Driven Procurement</b></p> <ul style="list-style-type: none"> <li>Improve government efficiency</li> <li>Demonstrate SPD's positive impact on the community</li> <li>Enhanced Customer Service</li> <li>Attract more local and small businesses to participate in County procurements</li> <li>Create greater economic opportunities for residents and small businesses</li> </ul>	<p>SPD will enhance Purpose Driven Procurement plan for all contracts.</p> <ul style="list-style-type: none"> <li>Implement revised review process for County contracts and projects and launch Administrative Order and Checklist. Training will be provided to all procurement related staff countywide.</li> <li>Maximize local and small business inclusion in County contracts and projects through unbundling of solicitations.</li> <li>Safeguard the equitable and fair treatment of employees in County contracts/projects.</li> <li>Uphold environmental and sustainability standards, legislation, and requirements in County procurements/ contracts/ projects.</li> </ul>



7	<p><b>Sustainable Procurement</b></p> <ul style="list-style-type: none"> <li>• Demonstrate SPD's positive impact on the community</li> <li>• Enforce a sustainable approach to labor practices</li> <li>• Improved strategic procurement planning through collaboration with departments</li> </ul>	<p>Promote adoption of Green/Environmentally Friendly/Sustainable Procurement methods and implement procedures to track.</p> <ul style="list-style-type: none"> <li>• Updating of Green Purchasing Guide</li> <li>• Continue to identify contracts/pool for conversion of conventional purchases to sustainable purchases</li> <li>• Develop tracking mechanism</li> <li>• Promotional Swag and Materials – Create a list that departments can choose from and extend to policy giveaways</li> <li>• Recycling of Uniforms</li> </ul>
8	<p><b>Staff Recruitment, Development; Retention and Succession Planning</b></p> <ul style="list-style-type: none"> <li>• Improve government efficiency</li> <li>• Attract and retain excellent employees</li> <li>• Enhanced Customer Service</li> <li>• Staff cross-training</li> </ul>	<p>SPD continues to face ongoing challenges acquisition and retention of procurement professionals. Competition for a qualified workforce, adequate compensation of employees, lack of qualified candidates, and an increased number of retirements and turnover are a few of the overarching issues that make it a challenge to create high performing teams. SPD is working with HR on filling the vacant positions, and reclassifying other positions as needed. The challenge of retaining highly qualified procurement professionals continues to be a substantial challenge; shortage in personnel is detrimental to productivity and can negatively affect contract cycle time and risk continuity of services to departments.</p> <p>Participation in professional procurement conferences is an important part of staying in tune with the industry and sharing best practices with other experts in the field; it provides a new learning environment that sparks creativity, reveals new ideas and tools, and builds inspiration and motivation. In addition to physical conferences, SPD keeps abreast with procurement best practices by attending virtual conferences during a time when traveling and gathering is not ideal.</p> <p>As part of the Mayor's initiative to transform the County's procurement processes, and to ensure that Miami-Dade County has a sound procurement strategy, which engages our community with integrity, fairness, innovation, competition, efficiency, and transparency, SPD has been charged in conducting an analysis of the current state of all facets of contracting and procurement processes in the County departments, and assess the benefits and vulnerabilities of the current procurement model. This study will include a review of all procurement related positions, procurement processes and actions, procurement workflows, and approval thresholds. SPD will prepare a report that will provide recommendations to improve accountability, transparency and to centralize procurement functions and resources where feasible. Additionally, this will allow for the establishment of procurement careers tracks that will allow for the filling of future procurement professional positions within SPD.</p> <p>a) SPD has developed a Procurement Training Academy for SPD staff and for client department Procurement Liaisons to establish guidelines and minimal standards to perform procurement functions. Training will be provided monthly to include process, legislation, specification development; market research etc. Trainings will be recorded and the videos will be made available on the department's website. The portal will offer online registration for training, request for training, guidance documents, and routine scheduled trainings or on-demand, in-person/zoom. Certificates will be issued for procurement recertification hours</p>

	<ul style="list-style-type: none"> <li>• Develop a training plan for employees:             <ol style="list-style-type: none"> <li>1) identify training needs at the individual, group and organization level;</li> <li>2) prepare a plan to assist employees requiring training to become certified which is a job requirement, and</li> <li>3) schedule training classes.</li> </ol> </li> <li>• Implement “new employee on-boarding process” utilizing various delivery methods, such as classroom; one-on-one with training coordinator; mentoring with senior procurement staff; and hands-on training with manager.</li> </ul> <p>Finally, the certification requirements, complexities of public procurement, and workload volume, make recruitment and retention of qualified personnel difficult. SPD has implemented a flexible work schedule and enhanced training opportunities to offset these challenges and better address the needs of our staff to continue creating a purposeful Department.</p>
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**FUTURE OUTLOOK**

There are several factors to manage that may affect the SPD’s operations within the next three to five years, including the following:

**1. Awards, Recognition and Leadership**

To continue our role as a leader for excellence in procurement practices as well as striving for continued organizational improvements, it is important to be recognized for organizational excellence by local, state and national governmental procurement associations. Staff will continue to strive for, and earn prestigious industry awards for innovation, professionalism, e-procurement, and leadership. Agencies successfully accredited elevate the standard of practice for the procurement profession and realize greater agency credibility and recognition. Additionally, SPD will continue to participate in leadership opportunities to share our knowledge and best practices with other procurement organizations through training and participation in procurement association meetings and conferences.

**2. Purpose-Driven Procurement**

The Purpose-Driven Procurement model is designed to create greater economic opportunities for residents and small businesses in the procurement of goods and services, architecture and engineering services, design-build, and construction, including any alternative procurement methods like public-private partnerships. The goal is to educate suppliers with the necessary requirements to remain aware of the global market dynamic that has enhanced SPD to change its policies, encourage new regulations, and enforce a sustainable approach to labor practices that are interested in doing business with Miami-Dade County

- **Workforce Training, Local Hire Commitment & Workplace Safety:** SPD will promote, reward and advance local workforce training programs as part of contract awards and ensure SPD is deploying local hire efforts through our procurement process. Further, our commitment to partner with the private sector must include the highest standards for workplace safety and worker protections. Through our procurement process, contract awards should reflect these core objectives and reward businesses that clearly outline their protocols.

- **Support Diversity:** While Miami-Dade County government procurement continues to make enormous strides towards promoting diversity, we can always do more. There are several ways in which we can continue to tap into the pool of talent that comes from our diverse community, especially lifting existing small businesses. This is a challenge and an opportunity we should lean into and embrace - because our success as a community depends on our ability to engage everyone in our labor force and ensure all families can prosper.
- **Resiliency & Energy Efficiency:** As we more aggressively address climate change and invest in robust sea level rise mitigation strategies, we need to ensure that our infrastructure is resilient and the way we deliver services. We should position our County to be energy efficient and our contracts should work towards reducing our carbon footprint. We need to look at how items going through the procurement process can help us accomplish these important environmental safeguards and prepare us to continue serving our residents well into the future with the greatest possible energy efficiency.

### 3. Innovation

**Public Private Partnerships (P3):** Over the last few years, a new, alternative procurement model was developed and successfully implemented for the procurement of a new, state-of-the-art Civil and Probate Courthouse that will meet the needs of our community for many years to come. The Courthouse Project was the County's first social infrastructure P3 and the first of its kind in the state of Florida. While this was an important milestone in the County's efforts to identify innovative methods for the delivery of large and complex public infrastructure projects, more exciting is the knowledge gained from the project that the County can benefit from and has been employing on other development projects.

As additional projects continue to be identified across the County which may include unfunded infrastructure plans or the receipt of unsolicited proposals, the need for additional staff resources will become more and more evident. SPD anticipates the development of numerous complex solicitations across a number of County departments with a limited staff of two to three professionals.

### 4. Customer Service and Automation

- **Enhance Supply Chain Helpdesk:** Add additional dedicated staff members immediately to support the INFORMS supply chain modules. Additional resources will be needed to stabilize, enhance, and support the system.
- **Automation of repeatable tasks and integration with INFORMS:** Leverage the functionality of Monday.com to consolidate, automate, and streamline simple Excel type databases that are frequently used and scattered across the organization. It is often impossible to query such scattered databases and do not provide organization-wide visibility and reporting capabilities.
- **Customer Feedback:** Monitor the formal and informal customer feedback program in every division to improve the quality of service of our operations.

*Refer to Attachment 1 – Business Plan Report*

As Of <= 02/07/2023

Attachment 1 - Business Plan Report

**Business Plan Report**  
**Strategic Procurement**

Perspective Name	Objective Name	Grand Parent Objective Name	Parent Objective Name	Measure Name	Details	As of	VR Flag		Actual	Target	FY2022-23 Annualized Target	FY2023-24 Annualized Target
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Customer	Increase contracting opportunities for small and local businesses to support the County's economic development goals			Number of vendor trainings and outreach events to promote contracting opportunities		'23 FQ1		17	9	36	36
	Efficiently and effectively manage the procurement processes and supply base to support the County's operations	GG3: Optimal internal Miami-Dade County operations and service delivery	GG3-3: Ensure procurement of goods and services is timely, meets operational needs, and is conducted in a fair and transparent manner	Average number of days to award design build contracts		'23 FQ1		288	290	290	290
				Average number of days to award competitive goods and services contracts up to \$1M		'23 FQ1		139	120	120	120
				Number of NEW vendors registered with the County		'23 FQ1		93	60	240	240
				Percentage of competitive goods and services contracts based on dollar value		'23 FQ1		89	90	360	360
				Average number of days to award architectural and engineering services contracts		'23 FQ1		359	260	260	260
				Average number of days to award competitive goods and services contracts over \$1M		'23 FQ1		241	230	230	230
				Percentage of abandoned Help Desk calls		'23 FQ1		0	2	8	8
				Average hold time (seconds) for calls handled by the INFORMS Strategic Sourcing Help Desk		'23 FQ1		20	120	120	120

Finance	Meet Budget Targets (SPD)			Positions: Full-Time Filled (SPD)	▬	'23 FQ1		99	n/a	n/a	n/a
Learning and Growth	Ensure the County's procurement professionals are competent, qualified and well trained			Number of trainings facilitated by SPD to promote employee development	▬	'23 FQ1	▲	17	12	48	48

Key:  - Initiative  - Featured Objective

### Initiatives

There are no Objectives associated to the initiatives