



County Administration Office

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County Administrative Officer

January 1, 2025

To: All County Staff

From: County Administrator's Office

Subject: Deputy Purchasing Agents' Authority Levels & Purchasing Guidelines

Effective January 1, 2025, the County's public project regulations are updated to align with the California Public Contract Code. As detailed in Attachments B-1 and C, these updates include increased dollar limits for Public Projects and an expanded definition of Public Projects, which now encompass installation work involving any County owned, leased, or operated facility.

Authority levels for Deputy Purchasing Agents (DPA) remain unchanged. DPAs are expected to ensure purchasing aligns with the general Guidelines established by the CAO/Purchasing Agent. DPA responsibilities are detailed in Chapter 2.24 of the Tuolumne County Ordinance Code (TCOC) and relevant statutes. A summary of DPA authority is provided in the table below:

Name	Approval Authority	Limitations
Roger Root, Assistant CAO	\$75,489.74	Only in the absence of the CAO.
Liz Peterson, Deputy CAO	\$75,489.74	Only in the absence of the CAO.
Blossom Scott-Heim, Public Works Director	\$25,000	Public Works business only. Limited to TCOC 2.24.030 subsection A.*
Annie Hockett, Health and Human Services Director	\$25,000	Human Services Agency business only. Limited to TCOC 2.24.030 subsection A.*
Eric Aitken, Director of Library and Recreation Services	\$10,000	Library and Recreation business only. Limited to TCOC 2.24.030 subsection A.*

*It is acknowledged that the Public Works Director, County Clerk, Health and Human Services Agency Director, and the Director of Library and Recreation Services also have limited purchasing/contracting authority, as defined in statutes related to those very specific functions.

Tuolumne County
Purchasing Quotation/Bidding Guidelines
Updated January 1, 2025

- 1. Goods and/or Services \$25,000 or less:**
 - No quotes required.
 - Purchase responsibly.
 - Purchase using a purchase order, credit card, contract or submit an invoice to the Auditor's Office for a check issuance.
- 2. Goods and/or Services \$25,001 up to the CAO signing authority:**
 - Written quotes must be obtained from at least three (3) vendors ("informal bid") unless the product is so specialized that three (3) quotes is not feasible.
 - Use the *Purchasing Quotation Form* (Attachment A) or an alternate written format, and a memo explaining the purchase, submit to the County Administrator's Office/Purchasing Agent.
 - Must have approval from Purchasing Agent/Deputy Purchasing Agent before buying.
 - Purchase using a purchase order, credit card, contract or submit an invoice to the Auditor's Office for check issuance.
- 3. Goods and/or Services when the annual aggregate cost exceeds the CAO signing authority:**
 - Use a Request for Proposals (RFP), Request for Qualifications (RFQ), or Invitation for Bids (IFB) to obtain competitive bids in OpenGov Procurement.
 - Use the County's Contract Template and Procedures via OpenGov Procurement.
 - Must have review and approval from Purchasing Agent/Deputy Purchasing Agent before buying.
 - Board of Supervisors' approval required for Service contracts.
 - Purchase goods using a purchase order, credit card, contract or submit an invoice to the Auditor's Office for check issuance as long as funds have been approved/budgeted.

*See attached *Goods and/or Services Purchasing Quotation/Bidding Matrix* (Attachment B-1). Contact the Purchasing Analyst with questions regarding purchasing goods/services.

Vehicle Purchasing Guidelines

- Departments wishing to purchase vehicles shall attempt to locate a vehicle listed on a State or other competitively-bid Fleet contract.
- When a department is unable to locate a vehicle that meets the operational need in a timely manner under a previously negotiated Fleet contract, the following steps shall be taken:
 - i. Obtain three (3) written quotes of similar vehicles, including details of the vehicle specifications and trim package.

1. Departments are encouraged to utilize local dealers in their bidding process.
- ii. Provide the three (3) quotes to the Purchasing Agent or Department Analyst.
- iii. Provide written documentation justifying why a previously negotiated contract was not utilized.

General Purchasing Guidelines

- Local vendors should always be given the opportunity to submit quotes/bids and when purchasing equipment or supplies, local vendors within Tuolumne County shall be given a 5% price preference. (TCOC § 2.24.050)
- Services are best secured through a contract as opposed to a purchase order or credit card. If you desire to use something other than a contract to secure services, please review the matter with the County Purchasing Agent who may in turn confer with County Counsel.
- All RFP's/ Bid Packages and amendments shall be processed using OpenGov Procurement. A contract amendment template is available in OpenGov.
- All RFP's/Bid Packages shall be reviewed with your department's analyst in the County Administrator's Office before being released. If a draft/sample contract is to be attached to an RFP or Bid Package, the draft/sample contract should be reviewed by County Counsel before releasing the RFP or Bid Package.
- Departments can use central purchasing systems developed through the State Department of General Services, California State Association of Counties (CSAC), National Association of Counties (NACO), other counties or like affiliate organizations in-lieu of pursuing independent RFP/bidding processes, if the funding source allows it.
- Consistent with the Board-adopted Information Technology (IT) Policy, technology and other IT purchases should be coordinated through the County's IT Department.
- All contracts and amendments shall be sent in DRAFT via OpenGov Procurement for review by your department's analyst in the County Administrator's Office and County Counsel prior to requesting signatures.
- The CAO can sign contracts for services up to the CAO signing authority (based on the Public Contract Code) but there is no signing limit for purchasing goods/products, as long as the funds are budgeted. All bidding requirements still apply.
- The CAO can sign contract renewals up to \$300,000 that meet all of the following conditions (TCOC 2.24.030 (I)):
 1. Have previously been approved by the Board of Supervisors,
 2. Are a continuation of service at the same level,
 3. For which funds have been budgeted,
 4. After approval by County Counsel and Risk Management.

- **Public Projects** have different procurement requirements. Cal. Public Contract Code § 22002(c) defines Public Projects as follows:
 - 1) The construction, reconstruction, erection, alteration, renovation, improvement, demolition, installation, and repair work involving any publicly owned, leased, or operated facility, and the painting or repainting of any publicly owned, leased, or operated facility.

*See attached *Public Projects Purchasing Quotation/Bidding Matrix* (Attachment C).
Contact the Purchasing Analyst with questions regarding securing bids for Public Projects.

**ATTACHMENT A
PURCHASING QUOTATION FORM**

Department:

Preparer:

General Description of Item & Purpose:

Quote #1

Firm Name:

Contact Person & Phone #:

Quote:

Quote #2

Firm Name:

Contact Person & Phone #:

Quote:

Quote #3

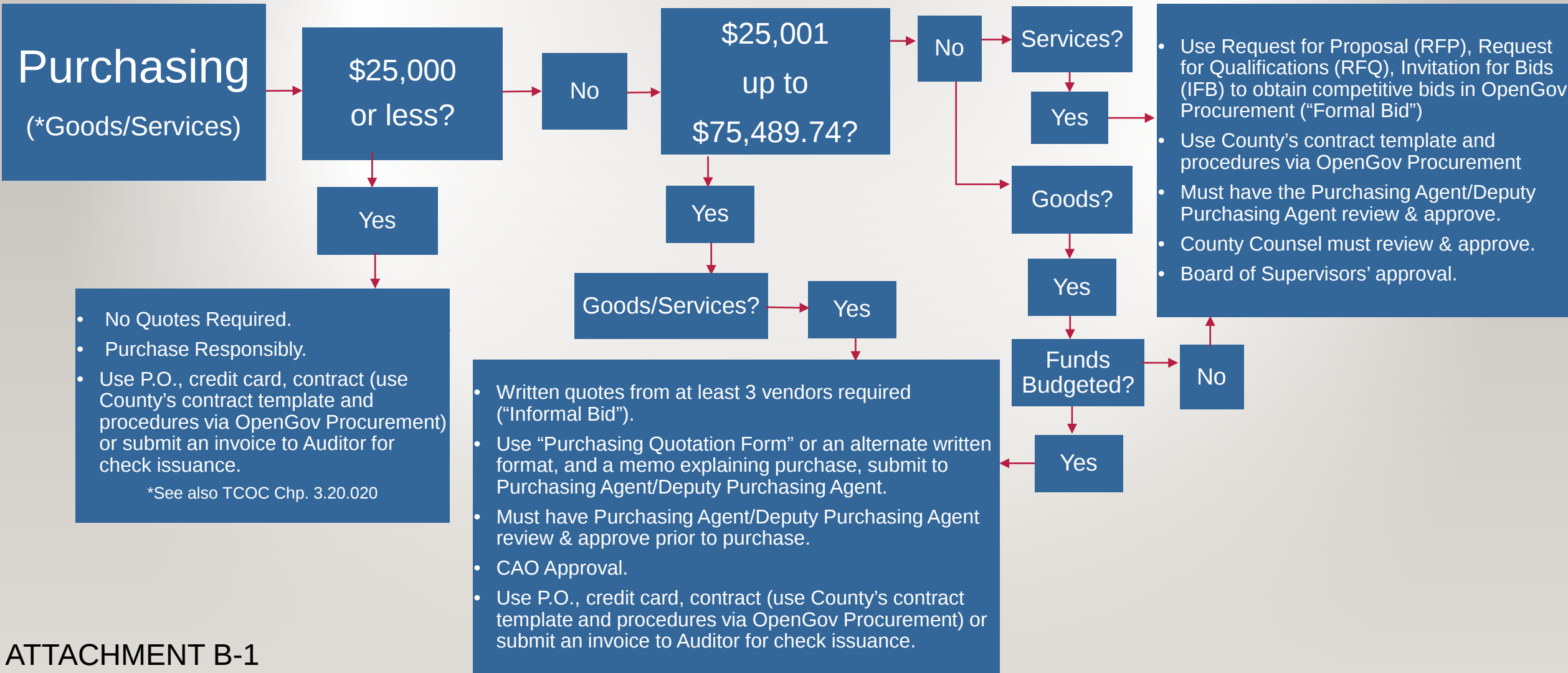
Firm Name:

Contact Person & Phone #:

Quote:

Award Recommendation (provide justification if recommendation is other than lowest quote):

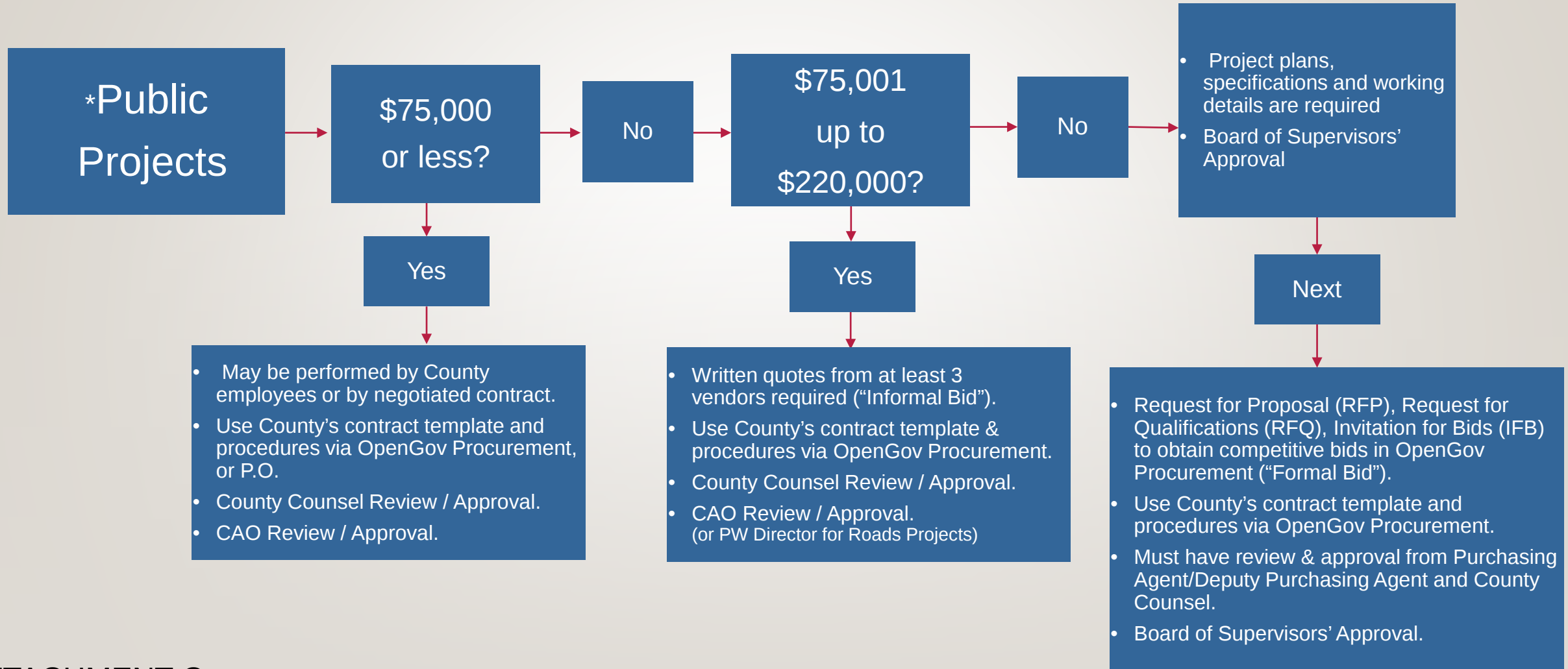
PURCHASING QUOTATION / BIDDING MATRIX



ATTACHMENT B-1

*Goods = Widgets, products, equipment, vehicles, etc. (See Purchasing Guidelines for specific details regarding vehicle purchases)
Services = Architectural services, design services, Software as a Service (SaaS), etc.

PURCHASING QUOTATION / BIDDING MATRIX



ATTACHMENT C

***Public Projects** = Construction, reconstruction, erection, alteration, renovation, improvement, demolition, installation, and repair work involving any publicly owned, leased or operated facility, or the painting or repainting of any publicly owned, leased or operated facility. (Cal. Public Contract Code § 22002(c)(1-2). Dollar limits set as per Cal. Pub. Contract Code § 22032(a-c)