



**BOARD OF SUPERVISORS
AGENDA LETTER**

Agenda Number:

Clerk of the Board of Supervisors
105 E. Anapamu Street, Suite 407
Santa Barbara, CA 93101
(805) 568-2240

Submitted on:
(COB Stamp)

Department Name: General Services
Department No.: 063
Agenda Date: June 3, 2025
Placement: Administrative Agenda
Estimated Time:
Continued Item: No
If Yes, date from:
Vote Required: Majority

TO: Board of Supervisors
FROM: Department Director(s): Kirk Lagerquist, General Services
Contact: Lynne Dible, General Services
SUBJECT: Local Vendor Program and Procurement Division Update, All Districts

DocuSigned by:
Kirk Lagerquist
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County Counsel Concurrence

As to form: Yes

Other Concurrence: Risk, CEO

As to form: Yes

Auditor-Controller Concurrence

As to form: Yes

Recommended Actions:

That the Board of Supervisors:

- a) Receive and file an update on the County's Local Vendor Program, Vendor Outreach and other Procurement Division Initiatives; and
- b) Determine that the above recommended actions do not constitute a project subject to environmental review under the California Environmental Quality Act (CEQA) pursuant to CEQA Guidelines Section 15378(b)(2)&(5), finding that the action consists of continuing administrative or maintenance activities, such as purchases for supplies and general policy and procedure making and organizational or administrative activities of governments that will not result in direct or indirect physical changes in the environment.

Summary Text:

This item is on the agenda to provide an update to the Board from the General Services Procurement Services Division (Procurement) on various Procurement initiatives, vendor outreach, the Local Vendor Program and the application of the Local Vendor Preference Policy (Policy) on competitive bids for tangible goods.

Discussion:

Procurement continues to work on implementing the Department Operations Purchasing Review recommendations that are guiding our efforts to enhance processes, communicate and monitor compliance, improve the systems used during the procurement cycle, and to restructure staff roles and responsibilities to position the division as a countywide strategic sourcing and business partner.

Included below is information on Policy application this past year, data on local vendor spend, Cooperative Purchasing arrangements, Master Service Agreements (MSAs) and additional discussion highlighting other important activities and initiatives taking place in Procurement.

A primary focus in Procurement this past year has been developing the update to the 2017 EPPP and Program to strengthen the County’s commitment to sustainable practices. The EPPP and related program enhancements and initiatives are being presented to the Board for formal adoption in a separate agenda item and action.

Background:

Local Vendor Spend – Services & Supplies:

This table presents Local Vendor spend as a percentage of total countywide spend on services and supplies for the past two fiscal years and the current fiscal year to date, where Purchase Orders and Board Contracts have been issued countywide.

Local Vendor Spend – Services & Supplies	Year to Date FY 2024-25	FY 2023-24	FY 2022-23
Total Countywide Services & Supplies \$'s	315,814,651.83	\$359,287,029	\$314,003,435
<i>Services & Supplies - Local Vendor \$'s</i>	<i>136,729,641.73</i>	<i>\$158,860,498</i>	<i>\$153,304,402</i>
<i>% Local Vendor Spend - Services & Supplies*</i>	<i>43%</i>	<i>44%</i>	<i>49%</i>

*Target: 60%

*YTD data 5/8/2025

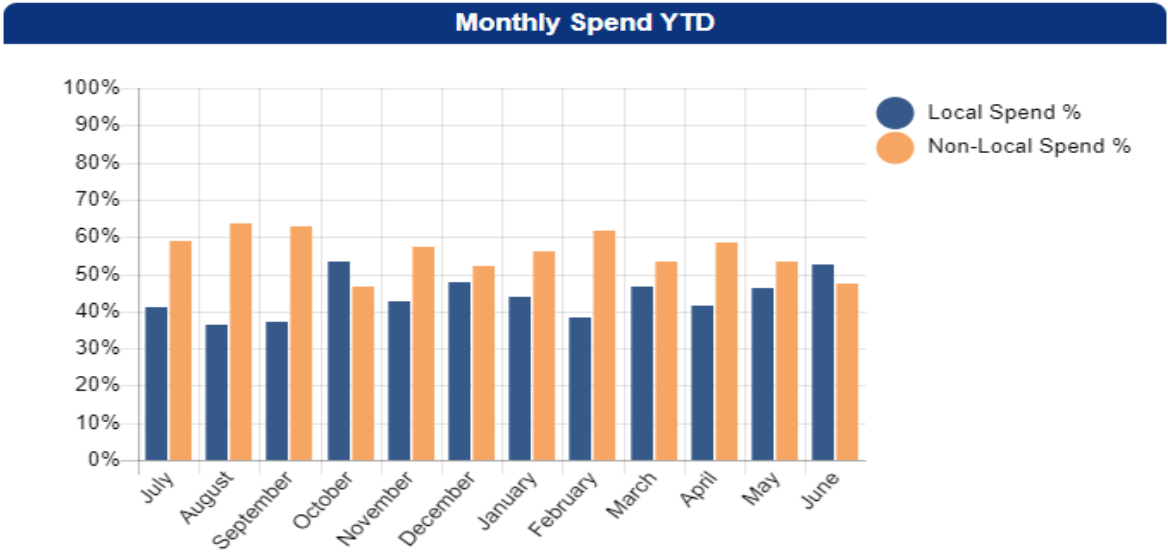


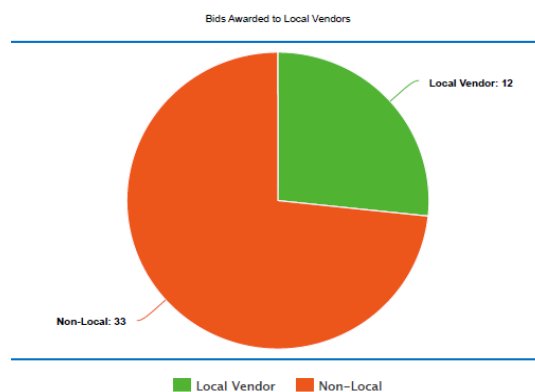
Figure 1 FY 2023-24

Local Vendor Preference:

The current Local Vendor Preference Policy provides a “Local Vendor” the opportunity to match the overall bid of the lowest non-local vendor, if their bid is the lowest local bid and within 6% of the non-local vendor bid, for tangible goods. Although the Local Vendor Preference has either not been applicable or necessary in over a year, the following data highlights the level of participation of our local vendors in county solicitations and in doing business with the county.

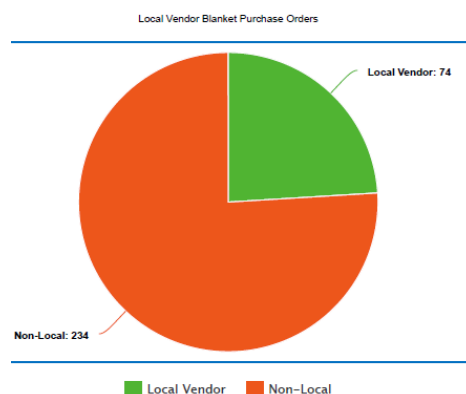
Local Vendor Solicitations FY 2024-25 Year to Date (YTD)

- 45 Tangible Solicitations completed to-date totaling \$12,411,892
- 12 of the 45 solicitations were awarded to local vendors **(27%)**
- Of the \$12,411,892 awarded, \$1,581,206 was awarded to local vendors **(13%)**



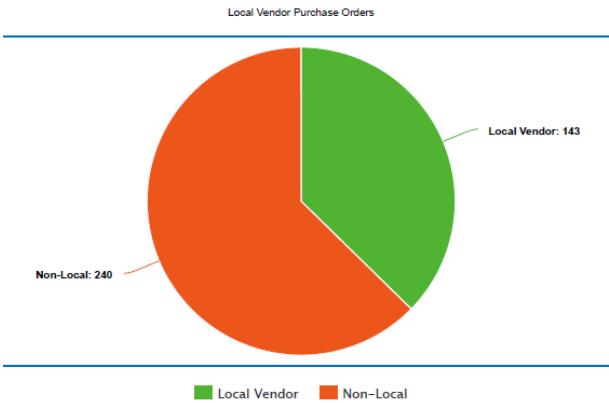
Purchase Orders FY 2024-25 YTD

- Of the 383 Tangible Purchase Orders (POs) processed to date, 143 were with local vendors **(37%)**
- 53 individual local vendors engaged



Blanket Purchase Orders FY 2024-25 YTD

- Of the 308 Blanket POs processed to date, 74 were issued to local vendors **(24%)**



On average, the County orders about 29.3% of tangible items from Local Vendors. Efforts are on-going to promote the use of local businesses.

Cooperative Purchasing:

The County continues to advance its strategic and efficient procurement practices through participation in cooperative purchasing programs. These programs deliver significant benefits, including cost savings, and streamlined contract processes. The table below highlights the County’s participation in cooperative purchasing arrangements over the past two fiscal years, including the number of agreements that utilized local vendors.

In FY 2023-24, Procurement engaged in 50 cooperative agreements, as authorized by Sec. 2-38.0 of the County Code. These agreements facilitated the acquisition of a wide range of commodities, such as technology hardware, medical supplies, heavy equipment, heavy-duty trucks and trailers, light-duty vehicles, and fuel.

By utilizing and participating in cooperative agreements established through successful competitive bidding, the County reduces administrative overhead, accelerates the purchasing process, and achieves cost savings. These agreements enable access to more competitive pricing by leveraging the purchasing power of larger entities. Additionally, cooperative purchasing fosters valuable relationships with other government agencies, suppliers, and the local vendor community, further enhancing the County’s procurement capabilities.

Participation in Cooperative Agreements FY 2022-23

Category	Number	\$ Amount
Total Cooperative Agreements Used	47	\$ 18,066,568.49
Local Vendor Cooperative Agreements Used	14	\$ 3,653,320.94
% Cooperative Agreements with Local Vendors	30%	20%

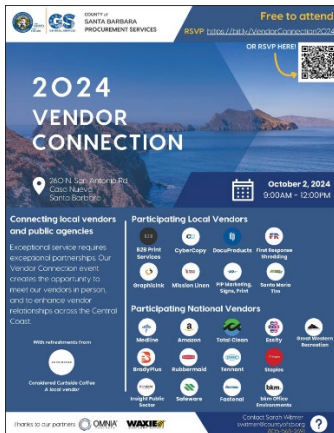
Participation in Cooperative Agreements FY 2023-24

Category	Number	\$ Amount
Total Cooperative Agreements Used	50	\$ 29,190,441.57

Local Vendor Cooperative Agreements Used	12	\$ 5,489,067.86
% Cooperative Agreements with Local Vendors	24%	19%

Purchasing Division Initiatives and Updates:

Vendor Connection Events:



In October 2024, Procurement hosted its 3rd annual “Vendor Connection” event in collaboration with Omnia and Waxie Sanitary Supply. This event was held on the Calle Real campus in South County. County departments had the opportunity to network with major suppliers, other local public agencies, neighboring city and County employees, as well as local vendors. There were 24 suppliers present, nine of which were local vendors. In total, the signed-in attendance was 162, including: 101 County employees from 17 departments, 20 local vendors, and 28 representatives from 12 outside agencies.

The Procurement team greatly appreciated the positive feedback and enthusiasm generated by the event. While the event's impact is challenging to measure in terms of data, the connections and partnerships established have significantly strengthened relationships between the County and its suppliers. Additionally, the event has created valuable opportunities for new suppliers to engage in County procurement processes. In the Fall of 2025, we will host our 4th event back in North County.

Master Service Agreements:

On January 10, 2023, the Board approved the MSA template as well as administrative changes to the Board approval process for the authorization of multi – department MSAs exceeding the annual aggregate threshold of \$200,000 in payments to a single vendor. This update results in added opportunities for cost savings and greatly streamlines the process, resulting in measurable improvements in efficiency both internally as well as externally for our suppliers.

Multiple County departments are now able to leverage these MSA's to utilize vendors routinely used by multiple County departments for similar services when the annual aggregate amount of spend to such vendors exceeds \$200,000 or is anticipated to exceed \$200,000 per fiscal year. The approved process permits Procurement to draft, package, present for Board approval, and administer multi-department MSAs by using the Board-approved MSA template, statement(s) of work specifying the services to be provided as requested by participating County departments, and other terms and conditions on file approved by County Counsel and Risk, as applicable.

In FY 2023-24, Procurement presented seven consolidated MSA Board Letters, including 31 MSA contract renewals for FY 2024-25. Based on departmental use, it is estimated that this process relieved the Board agenda from 114 individual Board Letters. Procurement has a performance measure in place to track the progress of this efficiency improvement.

MSA 2024-25

Master Service Agreements (MSA)

Pursuant to County Code §2-42, the Purchasing Agent is authorized to engage independent contractors to perform services, with or without the furnishing of materials, within the limits provided by state law. Contracts for services of independent contractors with an annual aggregate cost in excess of \$200,000 are subject to Board approval.

On January 10, 2023, the Board of Supervisors approved the MSA Template and administrative changes to streamline the process for Board approval of such MSAs. Under such streamlined MSA procedures, the County's Purchasing Division ("Purchasing") drafts, packages, presents for Board approval, and administers multi-Department MSAs exceeding the aforementioned \$200,000 threshold using the Board-approved MSA Template, and Statement(s) of Work specifying the services to be provided thereunder as requested by participating County departments, and other terms and conditions on file and approved by County Counsel and Risk, as appropriate.

The updated MSA process enables Procurement Services to propose that the Board approve a MSA with a vendor that is routinely being utilized by multiple County departments for similar services when the annual aggregate amount of County payments to such vendor exceeds, or is expected to exceed, \$200,000.

Procurement Services will track and manage the aggregate dollar amounts of payments made under each Board-approved MSA on an ongoing basis throughout the term of such MSA, and recommends Board approval of amendments to such MSA as needed in order to increase the aggregate expenditure amount authorized under such MSA, and/or to provide for additional services thereunder, e.g., in the event that additional County departments desire to procure such services thereunder during the term of such MSA.

Supplier	MSA Number	End Date	MSA	Total Contract Value
ACHDJIAN REAL ESTATE	MA8532	06/30/25	View MSA	\$225,000.00
Change Agents Training LLC	MA8645	06/30/25	View MSA	\$350,000.00
CIO Solutions LP	MA8558	06/30/25	View MSA	\$450,000.00
Clean Harbors Environmental Services Inc	TBD			
Coastal Copy	MA8644	06/30/25	View MSA	\$400,000.00
Coastal Tree Service	MA8185	06/30/25	View MSA	\$400,000.00
Compupwv Inc	MA8957	06/30/25	View MSA	\$1,250,000.00
Consortium Media Services	MA8958	06/30/25	View MSA	\$500,000.00
Fighting Back Santa Maria Valley	MA8509	06/30/25	View MSA	\$400,000.00
Granicus	MA8442	06/30/25	View MSA	\$350,000.00
Gray Quarter Inc	MA8960	06/30/25	View MSA	\$350,000.00
Healthcare Strategists Inc	MA9070	06/30/25	View MSA	\$400,000.00
Herenia Indigena LLC	MA8969	06/30/25	View MSA	\$500,000.00
Industrial Truck Bodies	MA8566	06/30/25	View MSA	\$550,000.00
Insights and Strategies	MA8547	06/30/25	View MSA	\$500,000.00
Mark Crane Tree Inc	MA8560	06/30/25	View MSA	\$500,000.00
Marborg Industries	MA8629	06/30/25	View MSA	\$1,750,000.00
Pacific Petroleum	MA9050	06/30/25	View MSA	\$600,000.00
Padre Associates Inc	MA8922	06/30/25	View MSA	\$450,000.00
PATH	MA9063	06/30/25	View MSA	\$200,000.00
Perez Landscaping	MA8564	06/30/25	View MSA	\$600,000.00
Peterson's Tree Care Inc	MA8533	06/30/25	View MSA	\$500,000.00
Regional Government Services Authority	MA8924	06/30/25	View MSA	\$400,000.00
Roger L Fortier DBA RLF Trucking	MA8642	06/30/25	View MSA	\$1,100,000.00
Sansum Clinic	MA10014	06/30/25	View MSA	\$300,000.00
Simpler Systems	MA8926	06/30/25	View MSA	\$750,000.00
TEKsystems	TBD			
Tetra Tech Inc	MA8466	06/30/25	View MSA	\$350,000.00
Tierra Verde Tree Care Inc	MA8641	06/30/25	View MSA	\$500,000.00
Triumph Protection Group Inc	MA8548	06/30/25	View MSA	\$2,497,177.00
Verizon Wireless	MA8465	06/30/25	View MSA	\$1,750,000.00
Z Consulting	MA8567	06/30/25	View MSA	\$400,000.00

How can I use a MSA?

Please start by reaching out to Procurement to check availability of budget on a MSA.

Getting involved

After reaching out to Procurement, submit a request to our team for review. This form can be utilized for current Fiscal Year requests or for renewals next Fiscal Year.

Please note that a request is not a valid procurement document and services cannot be made until a MSA is fully approved

Submit a Request

Future / Pending MSAs

CDW-G

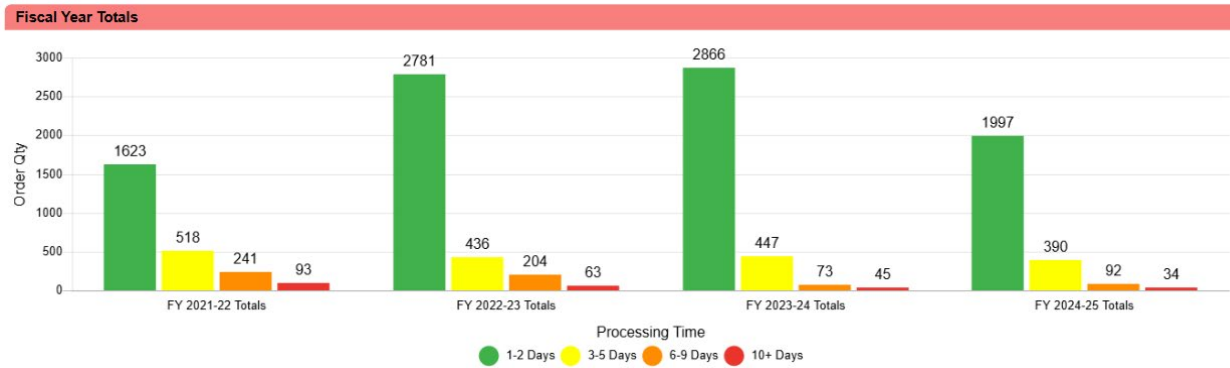
Clean Harbors Environmental Services

ePlus Technology, Inc

TEKsystems Global Services LLC

e-Requisitions:

Procurement fully implemented the Palette Arena e-Requisition platform in September 2021 to automate and streamline processes, provide visibility to departments, and more accurately track Purchase Order status and updates. As the division and the departments serviced have both become more adept with online e-Requisitions we have improved efficiency and processing times, in turn allowing departments to better serve their customers and vendor community. For FY 2023-24, Procurement staff completed 97% of the 3,431 requisitions received within the first five (5) calendar days and 84% within the first two (2) calendar days of receipt. A significant improvement in processing time can be seen each year since the e-Requisition process implementation. This effort has also prepared departments and Procurement for the new Workday online requisitioning processes soon to be in place.



Department Outreach:

This past March, Procurement facilitated their annual update and training via Teams on policies and procedures. This countywide training focuses on educating staff while addressing questions as departments prepare for the fiscal year-end. This virtual format allowed for broader participation and ensured accessibility for all departments. In addition to the annual training, Procurement has offered tailored, department-specific training sessions upon request, conducted either in person or via Teams to accommodate varying needs and preferences. These customized sessions have proven invaluable in addressing unique departmental challenges and providing targeted support. Each

training opportunity, whether county-wide or department-specific, has consistently garnered high levels of engagement, received positive feedback, and fostered stronger relationships and collaboration with our internal partners, enhancing efficiency and understanding across the organization.

AB2192 Increases CUPCCAA Bid Thresholds:

Effective January 1, 2025, Assembly Bill 2192 increased the bidding thresholds for public agencies that have adopted California Uniform Public Construction Cost Accounting Act ("CUPCCAA"). Procurement has updated its relevant documents to reflect these new thresholds.

The new CUPCCAA thresholds include:

- For public projects of \$75,000 or less, the public agency may perform the project by the employees of a public agency by force account, by negotiated contract, or by purchase order (this is an increase for the former limit of \$60,000 or less).
- For public projects of \$220,000 or less, the public agency may award the project by using its informal bidding procedures (this is an increase from the former limits of \$200,000 or less).
- For public projects of \$220,000 or more, the public agency must award the project by formal bidding procedures.
- In the event all the bids exceed \$220,000, the governing body of a public agency may award the contract at \$235,000 or less to the lowest responsible bidder if it determines the cost estimate of the public agency was reasonable.

Secure Shredding Services:

Procurement solicited a Request for Proposal (RFP) for Secure Shredding services and awarded contracts to two local vendors for this service:

- North County: Shred 2 You
- South County: First Response Notary and Shredding

In preparation, Procurement contacted using Departments to evaluate their usage and consolidated services as applicable to develop the scope of work. This was an overall successful solicitation that resulted in both a reduction in cost, and a business opportunity for two local vendors in our community.

EPPP and Practices:

On February 3, 2017, the General Services Department developed an EPPP, formalizing the County's dedication to minimizing impacts and demonstrating environmental leadership through policy development and program implementation. Procurement has recently revisited the EPPP and Practices to address sustainability in a more comprehensive way and is bringing the updated EPPP to the Board in a separate agenda item for adoption.

This renewed Policy serves as the framework for procuring environmentally sustainable products and services, prioritizing the procurement of goods and services with superior environmental performance from manufacturers and suppliers committed to environmental stewardship and eco-friendly practices.

Some of Procurement's Environmentally Preferable Procurement Activities include:

- Working with our office supply vendors to boost compliance on recycled content paper products

- Collaborating with ITD to set default printing countywide to double sided to conserve paper and ink
- Updating the internal and external Procurement webpages to include robust information on the Program, Sustainable Purchasing Guides, and the Policy
- Including links to the County's EPPP in all Procurement bids, solicitations and purchase orders for vendor/supplier reference for compliance
- Collecting used batteries and toner cartridges from departments for proper disposal
- Continuing education and training for County Departments on the EPP Policy and Practices

Fiscal and Facilities Impacts:

There are no fiscal impacts associated with the Board action to receive and file an update to the County's Local Vendor Program, Vendor Outreach and other Procurement Division Initiatives.

Special Instructions:

Please email one (1) copy of the minute order to Lynne Dible, General Services at ldible@countyofsb.org and one (1) copy of the minute order to Phung Loman, General Services at ploman@countyofsb.org.

Contact Information:

Phung Loman
Chief Procurement Officer
Ploman@countyofsb.org