

Memorandum



Date: May 2, 2024

Agenda Item No. 2(B)(9)
June 4, 2024

To: Honorable Chairman Oliver G. Gilbert, III
and Members, Board of County Commissioners

From: Daniella Levine Cava *Daniella Levine Cava*
Mayor

Subject: Response disclosing all contract awards for goods and services under prequalification pools – Directive No. 230836

This response is being presented to comply with the reporting requirements of Ordinance No. 23-28 (Ordinance), sponsored by Senator René Garcia, adopted by the Board of County Commissioners (Board) on May 2, 2023, directing the County Mayor or County Mayor’s designee to prepare and file a report on a biannual basis to the Board which discloses all contract awards for goods and services under approved prequalification pools, with the first response being due in January 2024.

Summary

To comply with this directive, the Strategic Procurement Department (SPD) extracted data into an Excel spreadsheet, however the Excel file for the six-month period (July 1, 2023 to December 31, 2023) has approximately over thirty nine thousand data lines and is overwhelming to review and digest in a static format. An online dashboard has been developed by SPD and it will provide the Board real-time information of spot market quotes awarded as required by the Ordinance, including: (a) the specific prequalification pools approved by the Board under which the contract awards apply; (b) the vendors awarded the contracts; (c) whether or not the awarded vendors are local or small businesses; (d) the amounts of the contract awards; (e) total contract amount spent per vendor; and (f) the pricing, including unit pricing, for the goods or services being purchased through the prequalification pool. While not mandated by the ordinance, the data being provided to the Board is for all prequalification pools, not just those subject to Board approval. Additionally, the data being provided is for more than a six-month period.

Report

In May 2023, the Mayor directed all County departments to begin utilizing the Strategic Sourcing module of the Integrated Financial Resources Management System (INFORMS) for bidding under goods and services pool with a requirement that by June 1, 2023 all bidding shall be done in INFORMS and that no department shall use email, fax, hardcopy, or any other software for bidding under the pools. This directive was intended to streamline bidding processes and enhance transparency for all vendors by having data in one system that can be easily extracted. Training was provided to all County departments, and the SPD Strategic Sourcing helpdesk is actively assisting vendors and staff in support of their bidding needs. At this time, the Miami-Dade Aviation and Water and Sewer Departments are currently transitioning from their instance of Enterprise Resource Planning (ERP) to INFORMS and will begin bidding in INFORMS in the near future. It should also be noted that the Public Housing and Community Development Department, as mandated by its funding source, utilizes a different financial system which includes the issuance of purchase orders and payments; therefore, their data for purchase orders under pools are not captured in INFORMS.

To gather and analyze data for this reporting, SPD staff worked with the INFORMS system team to extract available data using a query to show active prequalification pools in which spot market awards have been conducted and awards were issued, in the form of purchase orders (POs). Data for spot market awards is entered by departments managing the bidding process under the prequalification pool.

The large volume of data in the requested static report is difficult to review in Excel and PDF formats due to the voluminous fields required in the Ordinance. Therefore, SPD staff worked with the INFORMS

system team and Information Technology Department (ITD) staff to develop a real-time, interactive, user-friendly dashboard, in addition to the requested report. The dashboard presents information required by the Ordinance, such as vendors awarded under the pools, the purchase order amounts, and unit pricing. The underlying data can be exported in Excel format. A search function allows data to be filtered by time frame, pool title, pool number, and vendor. The dashboard can provide all necessary information to comply with the reporting requirements under the Ordinance. The dashboard can be accessed through the County's internal network at the following link: <https://app.powerbigov.us/reportEmbed?reportId=6ec54dca-13e1-49d9-a91d-e89be8ee32eb&autoAuth=true&ctid=fdde2c89-3838-45a3-b272-6cf08978701f>.

In the coming months, SPD will continue working with you and your staff to further refine and enhance the Pool Dashboard to ensure it meets the Board's needs, and that data can be accessible and summarized in a more user-friendly manner. SPD is working with ITD to expand the data presented to include information on all active pools and all vendors prequalified under pools, not just those for which a purchase order has been issued. SPD staff are available to provide a demonstration of the dashboard on a one-on-one basis, upon request, and solicit feedback for future improvements. Please note, the administration is requesting consideration of an amendment to Ordinance No. 23-28 to no longer require written static reports, as the real-time dashboard is available.

This report will be placed on the next available Board agenda pursuant to Rule 5.06(j)(1) of the Board's Rules of Procedure. Should the Board require details regarding specific pools, training on the dashboard, or any additional information, please contact Namita Uppal, Director and Chief Procurement Officer, at 305-375-1574.

- c: Geri Bonzon-Keenan, County Attorney
- Gerald K. Sanchez, First Assistant County Attorney
- Jess M. McCarty, Executive Assistant County Attorney
- Office of the Mayor Senior Staff
- Jennifer Moon, Chief, Office of Policy and Budgetary Affairs
- Yinka Majekodunmi, Commission Auditor
- Basia Pruna, Director, Clerk of the Board
- Department Directors
- Eugene Love, Agenda Coordinator