



Strategic Procurement Department Business Plan

Fiscal Years: 2024 and 2025
(10/1/2023 through 9/30/2025)

Namita Uppal
Digitally signed by Namita Uppal
DN: cn=Namita Uppal,
o=Miami Dade County,
ou=Chief Procurement Officer,
email=uppaln@miamidade.gov,
c=US
Date: 2023.12.22 14:33:20 -05'00'

Namita Uppal, Department Director

Date

Approved by:



Carladenise Edwards, Chief Administrative Officer

7/9/24

Date

Plan Date: December 19, 2023

TABLE OF CONTENTS

DEPARTMENT OVERVIEW	Page 2
Departmental Mission	
Table of Organization	
Our Customers	
Strategic Alignment, 4E, and Thrive305 Summary	
KEY ISSUES	Page 9
PRIORITY INITIATIVES	Page 10
FUTURE OUTLOOK	Page 16
ATTACHMENT 1	Page 18
BUSINESS PLAN REPORT	



DEPARTMENT OVERVIEW

Department Mission and Vision

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 laws 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 and Public Private Partnerships (P3) Solutions; 3) Architecture and Engineering; 4) Business 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, promotes full and open competition and conducts high level negotiations in the award of County contracts, implements and promotes Information technology procurement system enhancements, serves as the department's agenda coordinator, prepares Board of County Commissioners (Board) and Mayor agenda packages, and implements policies enacted by the Board.
2. The Goods and Services Division is responsible for the procurement of material, equipment, supplies, and services required by County departments. This Section ensures the 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:



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

- 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 heating, ventilation, and air conditioning.
 - 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. P3 Solutions Section 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 P3 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 development agreement, lease and/or design, build, finance, operate and maintain contract.
4. 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.
5. The Business Solutions Team is responsible for the management of all procurement technology tools used by County's procurement operation. The supply chain management (SCM) modules of the recently implemented INFORMS system were deployed with the help of this team. In addition to INFORMS, the Bid Tracking System, Project Administration, PQC/TC certification system, Monday.com, and other peripheral systems are managed and supported by this team. The Supplier portal provides online vendor registration capability and the electronic bidding platform for countywide use. A dedicated helpdesk within this team provides real-time phone support to all vendors during the regular County business hours. The Business Solutions team analyzes all legislative changes for potential impact on business process changes so that system changes can be designed, developed, and deployed with the help of technical team in a timely manner. The team also provides guidance for the purchase of new technology tools and conducts systems' training for vendors and countywide users. The team is responsible for reviewing and approving security access requests for the INFORMS supply chain modules. Currently, the team is working on stabilizing the various modules of INFORMS, while cautiously making enhancements to the system. The goal is to integrate all peripheral systems with



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

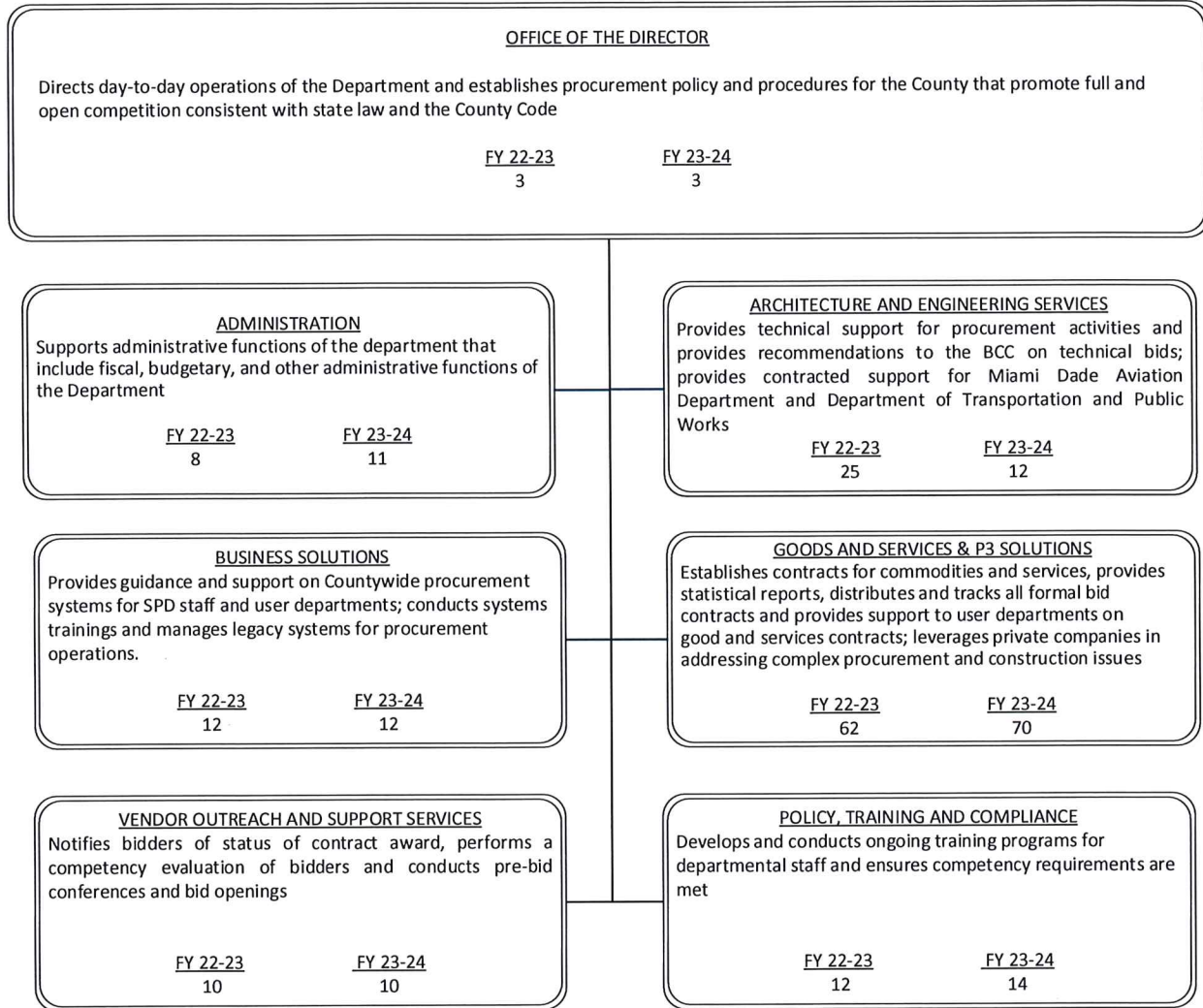
INFORMS, or enhance INFORMS functionality, so that users have a single system with end-to-end visibility of the lifecycle of all procurements.

6. Vendor Outreach and Support Services Section manages the vendor registration process and conducts vendor outreach events. The section is responsible for the quality assurance of data entry of procurement transactions from bid advertisement to the establishment of contracts and subsequent changes to the contracts in terms of time and money; inventory and management of capital equipment and office supplies, document retention process of awarded contracts; compliance with insurance, bid and performance bonds; oversee record management functions; and assist and coordinate public record requests.
7. Policy, Training and Compliance Section manages business process changes and provides ongoing training to SPD staff, department procurement staff, and stakeholders through the Procurement Academy, and training and outreach to vendors through the Vendor 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 technical advisor on policies and procedures, newly approved legislation and its legal interpretations, appropriate use of specifications and the structuring/re-structuring of solicitations.
8. General Administration Section is responsible for planning, directing, and coordinating departmental policies, functions, and operations; fiscal management; budget development, capital inventory and supplies. This team processes all personnel matters, assess staffing needs, recruitment, payroll, compensation, and other personnel related matters; maintains budgetary review and exercises fiscal control over revenues and expenditures; monitors compliance with the User Access Program; coordinates records management/storage and departmental audits; and develops, implements, and monitors strategic planning initiatives and performance measures.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

Table of Organization



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



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

Our Customers

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. To meet the County's varying needs and to align resources efficiently, SPD regularly holds collaborative monthly status meetings with many of the departments to stay committed to moving priority projects through the procurement process.

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. In the previous fiscal year, 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. In the new fiscal year, the Academy will provide certifications in public procurement and will introduce cross training countywide.

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. Through the academy SPD launched its first Quarterly Vendor Newsletter and will be launching the Procurement podcast, among other networking events in the new fiscal year.

The commitment remains high to provide affordable housing to County's residents. To assist with this initiative, SPD has committed to processing solicitations in an expedited manner to assist PHCD in providing services and remains committed to the full implementation of the County's INFORMS system. Staff attend weekly meetings to provide feedback on functional aspects.



Strategic Alignment, 4E, and Thrive305 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.

To the extent allowable by House Bill 3, 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 under the County contract 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, under the County contract, 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; 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 under County contract.

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 under County contract to increase the participation of small, diverse and disadvantaged enterprises, in contracting opportunities.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

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 training 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 over \$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*



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

Strategic Alignment, 4E, and Thrive305 Summary (continued)

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.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> • Strong leadership and integrity • Clear Mission Statement and Guiding Principles • Highly skilled and dedicated employees with diverse expertise • Collaboration with customers, partners, and stakeholders • Professional development training • Excellent customer service culture • Promotion of small business inclusion in County contracting and the growth of the small business community • Employee morale and satisfaction • Increased local vendor participation. • Documented and proven public procurement processes and best practices • Solution oriented to include development of alternative methods when necessary 	<ul style="list-style-type: none"> • Benchmarking with other agencies for best practices • Partner with Human Resources Department to improve recruitment and retention initiatives. • Partner with Miami Dade College for Interns for Field Study and Research Project • Partner with local colleges for college interns in the procurement field. • Partner with Local High Schools to introduce Seniors to the procurement field. • Delegation of authority for increased procurement efficiency/processing time • Continued business process re-engineering to align with INFORMS. • Succession planning and staff mentoring • Upgrade legacy procurement technology tools and integrate with INFORMS. • Launch of dashboards for real time status of projects
ASPIRATIONS	RESULTS
<ul style="list-style-type: none"> • Improve government efficiency. • Streamlined legislative requirements in procurement. • Updated technology tools • Attract and retain excellent employees. • Complete projects ahead of schedule • Countywide procurement training for all departments and vendors • Demonstrate SPD's positive impact on the community. • Enhanced Customer Service • Staff cross-training • Enhance capability to use alternative models such as P3 and to process unsolicited proposals. • Attract more local and small businesses to participate in County procurements. • Create greater economic opportunities for residents and small businesses. • Enforce a sustainable approach to labor practices. • Build a fully automated solution for all repeating procurement tasks integrated with INFORMS. 	<ul style="list-style-type: none"> • Establishing Web-based Key Performance Indicators • Follow project management methodology to plan, execute, monitor and measure, and optimize. • Analyzing the metrics and taking corrective actions on a recurring basis • Internal/External Stakeholder Surveys • Number of filled positions. • Satisfied Customers • Improved employee retention rates • Improved strategic procurement planning through collaboration with departments. • Outcomes based on efficiency. • Recognized as a leader by presenting local, state and national training opportunities or educational conferences for procurement professionals. • Communication of SPD successes and achievements • Recognized for organizational excellence in public procurement.



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. Some of the below initiatives were launched in the previous fiscal year and will be enhanced during this period.:

Key Initiatives	
<p>1 Strategic Business Management</p> <ul style="list-style-type: none"> • Improve government efficiency. • Updated technology tools • Build a fully automated solution for all repeating procurement tasks integrated with INFORMS. 	<p>INFORMS system went live in April 2021, streamlining business processes and replacing some of the existing technology tools to help the County evolve into a strategic organization. SPD managed the implementation of strategic sourcing platform for goods and services bidding across all County departments. Stabilizing INFORMS strategic sourcing operation and implementation of strategic sourcing for the needs of all Construction procurements during this year will require extensive support and assistance from all stakeholders. Sourcing events are time sensitive and subject to bid protests if timely support is not provided to the bidders as proposals are being uploaded across many different time zones. That support will be provided by the SPD helpdesk. The helpdesk needs to be supplemented with trained staff to meet the growing use of the bidding platform and provide quality service to all bidders and internal stakeholders.</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 functionalities will be implemented as resources become available:</p> <ol style="list-style-type: none"> a) Supplier Scorecard in INFORMS, to track vendor performance. b) Integration of Insurance transmittal functionality with INFORMS. c) Comprehensive reporting mechanism in INFORMS that includes historical data. d) Requisition processing across all Business Units to effectively utilize Strategic Sourcing. e) Clause Library to effectively utilize Supplier Contracts module.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

	<p>f) Integrate Contract Modification and Option to Renew functionality in INFORMS.</p> <p>In addition, the following technology projects will be addressed during this plan period.</p> <ul style="list-style-type: none"> a) Integration between INFORMS vendors and PQC/technical certification module of Project Administration (PA) system. b) Automate the A&E modules for transaction processing in PA. c) Migrate historical data from A&E and Design Build projects into Documentum. d) Enhance Monday.com for A&E workload tracking and reporting; 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 resources.
<p>2</p> <p>Vendor Engagement – Vendor Academy; Countywide procurement training for all departments and vendors</p> <ul style="list-style-type: none"> • Demonstrate SPD's positive impact on the community. • Attract more local and small businesses to participate in County procurement. • Create greater economic opportunities for residents and small businesses. <p>Vendor Performance Management</p> <ul style="list-style-type: none"> • Enhanced Customer Service • Improve government efficiency. • Updated technology tools <p>Vendor Risk Management</p> <ul style="list-style-type: none"> • Improve government efficiency. • Updated technology tools 	<p>Vendor Academy</p> <p>SPD will continue to enhance the offerings of the Vendor Academy to include:</p> <ul style="list-style-type: none"> • Free workshops and trainings (virtual and in-person as needed) • Website Update • Monthly Onboarding of Suppliers • Monthly Supplier Forum for Problem Solving and strengthening relationships with local businesses. • Launch additional 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. • Building on the annual Procurement Exposition with the goal of creating additional 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. • Commission District Vendor Workshops: Schedule in-person or virtual vendor workshops for each Commission district. • Vendor Registration Bootcamps • Develop social media presence strategy. <p>Vendor Performance Management</p> <p>Currently, there is no repository/database to track performance of vendors for goods and services contracts.</p> <ul style="list-style-type: none"> 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>Vendor Risk Management</p> <p>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 training. The roles of the 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>



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

3	<p>Collaborations/ Partnerships</p> <ul style="list-style-type: none"> • Staff cross-training • Enhanced Customer Service • Attract more local and small businesses to participate in County procurements. • Create greater economic opportunities for residents and small businesses. • Enforce a sustainable approach to labor practices. 	<p>Collaborations/Partnerships</p> <ul style="list-style-type: none"> • 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. • Continue to expand the Procurement Training Academy to focus on staff development within SPD and across all County departments, by offering certification programs etc. • Continue to publish the 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. • Continue to hold monthly/quarterly collaboration meetings with County departments to include meetings with Directors, and departmental procurement Staff to improve acquisition planning by utilizing the 24-month re-procurement process start mandate (30 months for larger/complex solicitations) • SPD will continue to work with the South Florida Anchor Alliance members to market, promote and manage the regional Marketplace. The partnership will include goods and services, design build, architectural and engineering, construction, and miscellaneous solicitations in the Regional Market in a phased approach.
4	<p>Enhancements to Pre-Qualification Pools</p> <ul style="list-style-type: none"> • Improve government efficiency. • Create greater economic opportunities for residents and small businesses. • Demonstrate SPD's positive impact on the community. • Enhanced Customer Service 	<ul style="list-style-type: none"> • <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 • <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. • <u>Establish new Pre-Qualification Pools</u> for longer periods up to 10 years, subject 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. • <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. • <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 certified small business enterprise firms to participate. The goal, if this program is successful, is to have the program be perpetual and seek funding from the Board on an as needed basis.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

<p>5 Streamline Legislative Requirements and Processes</p> <ul style="list-style-type: none"> • Improve government efficiency. • Streamline legislative requirements in procurement. • Complete projects ahead of schedule • Demonstrate SPD's positive impact on the community. • Create greater economic opportunities for residents and small businesses. • Enforce a sustainable approach to labor practices 	<ul style="list-style-type: none"> • Revisions to IO 3-21 – Protests • 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. • Revision to Master Procurement Implementing Order 3-38 • 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"> a) Changes recommended by Task Force for A&E Solicitation Process 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. • Work with Commissioners on various legislative initiatives: <ul style="list-style-type: none"> a) Living Wage Expansion b) Delegation of Authority c) Streamlining of Selection Committee Appointments d) Streamlining of procurement process e) Standardization of A&E and DB processes • Work with all County departments and Office of Resilience to promote adoption of Green/ Environmentally Friendly/Sustainable Procurement” methods and implement procedures to track. • Establish new cycles times upon implementation and stabilization of INFORMS. Focus on reducing cycle times. • Establish a dedicated INFORM Customer Service Team to provide assistance to vendors and departments. • Update manuals and guidelines on procurement processes and procedures in parallel with INFORM Implementation. • 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 the number of submittal forms for inclusion within INFORMS. • Streamline Board of County Commissioners Agenda process. • 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. • 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 conducted via Survey Monkey. The first Procurement Report Card Survey findings should provide greater insight into specific areas where targeted efforts can be pursued. • Use Monday.com to track procurement timelines for selection committee procurements, bids, non-competitive procurements. • 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. • Conflict of Interest and Neutrality Affidavits for Selection Committee members
---	---



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

		<ul style="list-style-type: none"> • Simplify formation of Selection Committees: The current process is managed by the Small Business Division and can be simplified further for expediency. • Research and implement alternate scoring methods for evaluation of goods and services. • Implement real-time management and tracking solutions. • 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. • Implement tracking methods and delivery timelines to monitor progress for countywide signature projects.
6	Purpose Driven Procurement <ul style="list-style-type: none"> • Improve government efficiency. • Demonstrate SPD's positive impact on the community. • Enhanced Customer Service • Attract more local and small businesses to participate in County procurements. • Create greater economic opportunities for residents and small businesses 	<p>SPD will enhance Purpose Driven Procurement (PDP) process for all contracts. The formal PDP process was launched in July 2023. Goals for this year include:</p> <ul style="list-style-type: none"> • Fine tuning of the established Administrative Order and Checklist. • Provide ongoing training to ensure all procurement related staff countywide are trained at least once a year. • Maximize local and small business inclusion in County contracts and projects through unbundling of solicitations. • Safeguard the equitable and fair treatment of employees in County contracts/projects. • Uphold environmental and sustainability standards, legislation, and requirements in County procurements/ contracts/ projects.
7	Sustainable Procurement <ul style="list-style-type: none"> • Demonstrate SPD's positive impact on the community. • Enforce a sustainable approach to labor practices. • Improved strategic procurement planning through collaboration with departments. 	<p>Promote adoption of Green/Environmentally Friendly/Sustainable Procurement methods and implement procedures to track.</p> <ul style="list-style-type: none"> • Updating of Green Purchasing Guide • Continue to identify contracts/pool for conversion of conventional purchases to sustainable purchases. • Develop tracking mechanism. • Promotional Swag and Materials – Create a list that departments can choose from and extend to policy giveaways. • Recycling of Uniforms
8	Staff Recruitment, Development; Retention and Succession Planning <ul style="list-style-type: none"> • Improve government efficiency. 	<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 will continue to work 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. SPD is partnering with Florida International University and Miami Dade College to recruit college interns who show an interest in the procurement field.</p>



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

<ul style="list-style-type: none"> • Attract and retain excellent employees. • Enhanced Customer Service • Staff cross-training 	<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. Staff are registered for annual conferences held by NIGP, FAPPO, NASPO, NPI and other procurement related agencies.</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>SPD has developed and launched 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 continue to be provided monthly to include process, legislation, specification development, market research etc. Training 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"> • Develop a training plan for employees: <ol style="list-style-type: none"> 1) identify training needs at the individual, group and organization level. 2) prepare a plan to assist employees requiring training to become certified which is a preferred job requirement, and 3) schedule training classes. • 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. <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>
--	--

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. 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 continue 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

- **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

The County's its efforts to identify innovative methods for the delivery of large and complex public infrastructure projects, more exciting is the knowledge gained from the state of the art Civil and Probate Courthouse project that the County can benefit from and has been employing on other development projects. Some of these future contracts include the Seaport's state of the art phytosanitary treatment and cold chain processing service facility to be constructed on a designated County owned property for the purpose of providing phytosanitary treatment and cold chain processing services for perishable goods passing through Port of Miami and Miami International Airport (MIA). The Project will attract and service new refrigerated cargo business through Port of Miami and MIA and generate the highest financial return to the Seaport and MDAD. The project is expected to exceed \$140,000,000.

Another contract is for establishing a revenue generating lease agreement for the design, build, financing, operation and maintenance of a new hotel located at MIA. This contract is the fulfillment of the County's long-planned hotel on County-owned property, consistent with world-class standards for international airports and accommodating the present and future needs of passengers at the MIA. The anticipated revenue to the County is \$240,000,000 for the 50-year lease term.

The County is currently working on its long term Zero Waste Master Plan. As we explore ways to reduce the creation of waste, and to divert waste from landfills and incinerators using technologies that can reuse, repurpose, recycle and recover materials in an environmentally, socially and economically sustainable way, SPD is taking the lead to connect knowledge based expert vendors promoting their products, technologies, and ideas with the Regulatory and Economic Resources and Solid Waste Management departments for further consideration.



Departmental Business Plan and Outlook
Department Name: Strategic Procurement Department
FY2023-24 & FY2024-25

Another project is the Metrocenter Redevelopment Project, which will provide private redevelopment of approximately 16.6 contiguous acres of County-owned properties within the downtown area in the City of Miami. The properties are a combination of excess land and underutilized parcels formed from 11 primary sites, the majority of which are improved with governmental uses that will need to be relocated and/or reconstructed in order to vacate the lands for development. The master developer shall execute the County-approved master plan for the orderly take-down of the different sites, which is anticipated to be over a 12-to-15-year period. SPD is positioned to have appropriate management, staff support team and consultants; release as a 2-step Request for Proposals like other large, complex development deals. The project will have County-wide significance.

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 they 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

