Procurement of ~~Non-Professional~~General Services 5.1.8

PURPOSE

~~It is T~~This~~e~~ policy outlines the internal process of procuring general services. ~~of the City of San José to create opportunities for competition to arrive at the most economical price while meeting operational needs when acquiring non-professional services. This policy outlines the internal process of procuring non-professional services which cannot be purchased via a citywide Open Purchase Order or through utilization of a City Procurement Card (Please refer to City Policy Manual Section 5.1.2, City Procurement Cards).~~

AUTHORITY

City of San José Municipal Code (Section 4.12)~~., Council Policy 4-6 Environmentally Preferable Procurement, and Council Policy 0-35 Procurement and Contract Process Integrity and Conflict of Interest.~~

POLICY

It is the policy of the City of San José to acquire general ~~non-professional~~ services ~~which~~ that meet the City's operational requirements, in the most cost-effective and efficient manner. ~~The Finance Department provides for the acquisition of some services through citywide open purchase orders (Visit Finance's Intranet site at https://sanjoseintranet--simpplr.vf.force.com/apex/simpplr__app?u=/site/a14a500000CPZgPAAX/dashboard and click on Purchasing).~~

~~Non-professional~~General services include but are not limited to maintenance or nonstructural repair of City buildings as defined in Section 4.12~~.055.A.1.a~~ of ~~the~~ Municipal Code such as elevator maintenance, custodial services, and pest control services; repair, modification, and maintenance of City equipment; cleaning, analysis, testing, moving, removal, or disposal of City materials, supplies, and equipment; landscape maintenance; and temporary personnel services.

The Finance Department ~~/~~Purchasing Division ensures that the acquisition of general~~of non-professional~~ services is made in compliance with the applicable Municipal Code sections, including but not limited to the competitive solicitation requirements, the Local and Small Business Preferences, Procurement and Contract Process Integrity and Conflict of Interest, and applicable insurance requirements, and that the resulting contracts are executed by duly authorized City officials.

~~ACQUISITION~~ PROCEDURES

I. Procurement Development~~cessing of Purchase Requisitions~~:

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Department	1. Identifies the operational need to procure ~~non-professional~~general services. 2. Refers to the Purchase Order & Bid Procurement Guidelines and Purchasing Contract & RFP Procurement Guidelines on the Finance-Purchasing Intranet Page. ~~2. Obtains such non-professional services through citywide open purchase orders, if available.~~ ~~3.~~ Submits a Financial Management System (FMS) requisition or procurement request to Finance-Purchasing with all required documents~~If not through citywide open purchase orders, the Department determines the continuous or one-time requirement for such non-professional services~~. ~~4.~~3. ~~5. If the requirement is infrequent and is less than $1,000 and the purchase is in compliance with City Policy Manual Section 5.1.2, City Procurement Cards, the purchase is assigned to Department Procurement Cardholders.~~ ~~If the requirement is equal to or more than $1,000, the Department develops specifications for such non-professional services. Specifications must provide for fair and open competition, cannot be written by potential respondents to the resulting solicitation, and shall comply with Council Policy 4-6, Environmentally Preferable Procurement.~~ ~~Complies with provisions of City Policy Manual Section 5.1.1, Procurement and Contract Processing Integrity and Conflict of Interest – Administrative Procedures.~~ ~~Processes a California Environmental Quality Act (CEQA) determination with Planning, Building and Code Enforcement (PBCE) for commodity codes identified on Purchasing Intranet site (see bolded Commodity Code listings).~~ ~~Requests an Office of Equality Assurance determination to identify the applicability of prevailing or living wage requirements.~~ ~~. For requirements with an estimated value above $10,000, identifies the evaluation factors and respective weights of these evaluation factors and submits them with the specifications.~~ ~~11. If the procurement's estimated value exceeds $1 million, submits a "Request to Develop a Source Selection Plan" for procurement of~~

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~~non-professional services in accordance with City Policy Manual Section 5.1.3, Source Selection Plan.~~

~~. If grant funds are used to purchase services, informs Finance/Purchasing that a portion of or all of the procurement of such non-professional services will be funded with grant funds in accordance with City Policy Manual Section 5.1.6, Procurements with Grant Funds. The Department shall also transmit a copy of all relevant grant purchasing regulations.~~

~~13.~~ ~~Submits an FMS System requisition with detailed specifications and applicable information such as CEQA, Grant funding, and an OEA Number.~~

~~. Identifies a departmental contact person responsible for the requisition and the departmental billing contact person in the FMS requisition.~~

~~. Includes contact information about vendors who may be qualified to provide the non-professional services.~~

~~Visits Finance/Purchasing Intranet site (https://sanjoseintranet--simpplr.vf.force.com/apex/simpplr__app?u=/site/a14a500000CPZgPAAX/dashboard) for detailed information about these processes and any budget control measures and respective processes issued by the City Manager's Budget Office.~~

II. Processing of Procurement~~Solicitation~~s:

Finance~~-~~/ Purchasing

1. Reviews the requisition/procurement request and requests further information from the department contacts, as needed.

2. Provides scope/specifications to Risk Management for determination of insurance requirements~~Requests determination of appropriate insurance levels from Risk Management~~.

3. Issues solicitation in accordance with the City's Municipal Code when required. (Move to Section III Issuance of Purchase Orders or Execution of Agreement if no solicitation is required)

4. Acts as single point of contact for the solicitation~~,~~ and addresses~~any~~ questions or clarifications about the solicitation with the department contact.

~~4.~~5. Holds a public bid opening, if applicable.

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	~~5.~~6. Review~~ceive~~s solicitation responses for responsiveness and compliance with specified requirements.~~and forwards the technical responses to the Department.~~
	~~6.~~7. Facilitates the low-price determination/evaluation process and forwards the results to the Department.
Department	~~7.~~8. Reviews and evaluates solicitation~~technical~~ response information and provides input to Finance-Purchasing.
	~~8.~~9. Communicates the final technical evaluation to Finance/Purchasing in writing as applicable.
Finance~~-~~/ Purchasing	~~9.~~10. Tabulates the cost responses, technical evaluation scores, and final scores, including the local and small business preference as applicable.
	~~10.~~11. Issues Notices of Intent to Award ~~contract~~, which starts the ~~10-day~~ protest period.
	~~11.~~12. Responds to protests received, if any.

III. Issuance of Purchase Orders or Execution of Agreement

Finance~~-~~/ Purchasing	1. Prepares Council Memorandum for award of Purchase Order/Agreement If the resulting Purchase Order/Agreement is above the City Manager's Contract Authority. (Move to #3 if the Purchase Order/Agreement is less than the City Manager's Contract Authority~~If the solicitation is above $250,000, processes Council Memorandum for award of contract).~~
Department	2. Assists Finance/Purchasing with processing of Council Memorandum, including but not limited to, writing or providing information for the Outcome, Background, and Budget Reference sections as applicable.
	3. Provides input for the~~to an~~ A~~a~~greement, if applicable.
Finance~~-~~/ Purchasing	4. Negotiates A~~a~~greement in consultation with Department and vendor, if applicable.
	5. Develops A~~a~~greement ~~, if applicable,~~ and forwards ~~for review~~ to the City Attorney's Office for review, if applicable.
	6. Prepares finalized draft of Agreement prior to approval by Council, if applicable.

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7. Issues Purchase Order after obtaining required approvals, if applicable.
~~6. Receives signed copy of agreement from contractor prior to award of contract by Council.~~

~~7.~~8. ~~Issues and~~ D~~d~~istributes P~~p~~urchase O~~o~~rder copies to D~~d~~epartment and~~,~~ vendor~~, , and accounts payable,~~ if applicable.

~~8.~~9. Processes A~~a~~greement for execution after obtaining required approvals, if applicable.

~~9.~~10. Files P~~p~~urchase O~~o~~rder copy or A~~a~~greement in accordance with approved City retention schedule.

IV. Purchase Order/Agreement~~Contract~~ Administration

Department~~ /~~ Contract Administrator

1. Authorizes services to be rendered in accordance with the P~~p~~urchase O~~o~~rder or A~~a~~greement.
2. Assures that vend~~contract~~or provides services in accordance with the Purchase Order or Agreement.
3. Identifies non-compliance of services provided and meets with vend~~contract~~or to rectify the issues. ~~I~~If services were not provided as required by the P~~p~~urchase O~~o~~rder or A~~a~~greement, ~~deducts appropriate amounts as identified by the purchase order or agreement~~addresses discrepancies accordingly.
4. Authorizes payment by approving~~signing off on~~ invoices in accordance with the Purchase Order or Agreement.
5. Forwards approved invoices to departmental Accounts Payable section.

V. Payment Processing

Department~~ /~~ Accounts Payable

1. Receives approved invoice from Contract Administrator and compares with Purchase Order/Agreement for Unit Cost pricing and/or applicable compensation rates.
2. Identifies use tax accruals, if applicable~~Adjusts invoice payment for early discount payments, if applicable (stated on Purchase Order)~~.
3. Ensures that invoices are mathematically correct.

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4. Enters appropriate payment data into the FMS f~~City's Financial Management System f~~or payment of invoices received to generate an edit list.

5. Forwards edit list, approved invoice, and any other applicable back-up documentation to Finance-/Accounts Payable.

~~5.~~6. Records Fixed Assets to Detail Code 4082 and includes a detailed description of the fixed asset (Make, Model, Serial Number) in the description section of the accompanying edit list as applicable.

Finance-/Accounts Payable

7. Reviews documentation and issues payment during the payment cycle requested by Department after receiving approved invoices and applicable documentation.

~~6.~~8. Accrues use tax, if applicable.

~~7.~~9. Retains all original documentation in accordance with the City~~Finance Department~~ retention schedule.

Approved:

/s/ Maria Öberg
Director of Finance

July Day, 2026
Date

Approved for Posting:

/s/ Jennifer A. Maguire
City Manager

July Day, 2026
Date

~~/s/ Scott P. Johnson~~
~~Director of Finance~~

~~May 22, 2008~~
~~Date~~

~~Approved:~~

~~/s/ Christine Shippey~~
~~Assistant City Manager~~

~~May 22, 2008~~
~~Date~~