Procedure of ~~Information Technology~~Professional Consulting Services 5.1.9

PURPOSE

T~~It is t~~hi~~se~~ policy outlines the internal process of procuring professional consulting 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 Information Technology. This policy outlines the internal process of procuring Information Technology 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 ~~Information Technology~~professional consulting services ~~which~~ that meet the City's operational requirements~~,~~ in the most cost-effective and efficient manner.

This policy addresses the purchase of ~~technology and technology related projects~~ professional consulting services. ~~that require the procurement of hardware and/or software and professional related services required for the installation, configuration, training, implementation and maintenance of the system as well as software and related license and maintenance agreements.~~

City departments in coordination with the City Attorney's Office ensure that the acquisition of professional consulting services are~~The Finance Department/Purchasing Division ensures that the acquisition of Information Technology 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 Integrity and Conflict of Interest, and applicable insurance requirements, and that the resulting contracts are executed by duly authorized City officials.

~~ACQUISITION~~ PROCEDURES

I. Pr~~ocessing of Purchase Requisitions~~ocurement Development:

Department

1. Identifies the operational need to procure ~~Information Technology~~professional consulting services.

~~2. Receives approval from the Information Technology Planning Board for procurements with an estimated dollar value of $100,000 or greater.~~

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~~3.~~2. Develops specifications for such professional consulting services~~Information Technology~~. Specifications must provide for fair and open competition and~~,~~ cannot be written by potential respondents to the resulting solicitation.~~, and shall comply with Council Policy 4-6, Environmentally Preferable Procurement.~~

~~4. Receives approval of specifications from the Information Technology Department.~~

~~5.~~3. Complies with provisions of City Policy Manual Section 5.1.1, Procurement and Contract Processing Integrity and Conflict of Interest – Administrative Procedures.

~~6.~~4. For requirements with an estimated value above $1~~0~~50,000, identifies the evaluation factors and prepares ~~respective weights of these evaluation factors and submits t~~solicitation documents ~~hem~~ with the specifications as appropriate~~. If warranted, the Department submits a "Request for Approval of Brand Name/Sole Source Procurement" in accordance with City Policy Manual Section 5.1.4, Brand Name and Sole Source Procurements~~.

~~7. If the procurement's estimated value exceeds $1 million, submits a "Request to Develop a Source Selection Plan" in accordance with City Policy Manual Section 5.1.3, Source Selection Plan.~~

~~8.~~5. If grant funds will be~~are~~ used to purchase services, incorporates~~s~~ applicable grant requirements into the procurement accordingly.~~, informs Finance/Purchasing that a portion of or all of the procurement 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.~~

~~9. Submits an email with detailed specifications and applicable information as required by aforementioned policies.~~

~~10. Includes contact information about vendors who may be qualified to provide the solution.~~

~~11.~~6. Visits Consulting Services~~Finance/Purchasing~~ Intranet Ssite ~~(https://sanjoseintranet--simpplr.vf.force.com/apex/simpplr__app?u=/site/a14a500000CPZgPAAX/dashboard)~~ for ~~detailed~~ information about required~~these~~ processes ~~and any budget control measures and respective processes issued by the City Manager's Budget Office~~.

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~~Information Technology Department~~

~~12.~~7. Reviews specifications to ensure compliance with City requirements in coordination with the City Attorney's Office~~Citywide technology infrastructure and requirements~~.

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

Department~~Finance/ Purchasing~~

1. Finalizes~~Reviews the~~ requirements and develops a solicitation in coordination with the City Attorney's Office~~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 Execution of Agreement if no solicitation is required)

4. Acts as single point of contact for the solicitation~~,~~ a~~n~~nd addresses~~y~~ questions or clarifications about the solicitation accordingly~~with the department contact~~.

5. Receives solicitation responses and reviews for responsiveness and compliance with specified requirements~~forwards the technical responses to the Department~~.

6. Facilitates the evaluation process.

~~Department~~

~~7.~~ Reviews and evaluates ~~technical~~ response information.

~~8. Communicates the final technical evaluation to Finance/Purchasing in writing.~~

~~9.~~7.

~~Finance/ Purchasing~~

~~10.~~8. Tabulates the cost responses, technical evaluation scores, and final scores, including the local and small business preference as applicable.

~~11.~~9. Issues Notices of Intent to Award ~~contract~~, which starts the ~~10-day~~ protest period.

~~12.~~10. Responds to protests received, if any.

III. ~~Issuance of Purchase Orders or~~ Execution of Agreement

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~~Finance/ Purchasing~~Department	1. ~~If the solicitation is above $250,000, processes Council Memorandum for award of contract~~Prepares Council Memorandum for award of Agreement If the solicitation is above the City Manager's Contract Authority. (Move to #2 if the Agreement is less than the City Manager's Contract Authority)~~.~~
	~~2.~~1.
~~Department~~	~~Assists Finance/Purchasing with processing of Council Memorandum, including but not limited, writing or providing information for the Outcome, Background, and Budget Reference sections.~~ ~~Provides input to an agreement, if applicable.~~
~~Finance/ Purchasing~~	~~5.~~2. Negotiates agreement in consultation with vendor~~Department, if applicable~~. ~~6.~~3. Develops agreement ~~, if applicable,~~ and forwards for review to the City Attorney's Office. ~~7.~~4. Prepares finalized draft of Agreement prior to approval by Council, if applicable~~Receives signed copy of agreement from contractor prior to award of contract by Council~~. 5. Processes ~~Issues and distributes purchase order or~~ Agreement for execution after obtaining required approvals.~~copies to department, vendor, and accounts payable, and City Clerk as applicable.~~ ~~9.~~6. Files ~~purchase order copy or A~~agreement in accordance with approved City retention schedule.

IV. Contract Administration

Department~~ /~~ Contract Administrator	1. Authorizes services to be rendered in accordance with the ~~purchase order or A~~agreement. 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. ~~If~~ services were not provided as required by the ~~purchase order or A~~agreement, addresses discrepancies accordingly~~deducts appropriate amounts as identified by the purchase order or agreement~~. 4. Authorizes payment by approving~~signing off on~~ invoices in accordance with the ~~Purchase Order or~~ Agreement.

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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 Agreement for Unit Cost pricing and/or applicable compensation rates.
2. Ensures that invoices are mathematically correct.
3. Enters appropriate payment data into the FMS ~~City's Financial Management System~~ for payment of invoices received to generate an edit list.
4. Forwards edit list, approved invoice, and any other applicable back-up documentation to Finance~~ /~~Accounts Payable.

Finance~~ /~~Accounts Payable

5. Reviews documentation and issues payment during the payment cycle requested by Department after receiving approved invoices and applicable documentation.
6. 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:~~

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

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