

ENTERPRISE PROCUREMENT POLICY SCHEDULE - AS OF APRIL 17, 2025

| Policy | Status | Next Steps | Target Completion Date |
|---------------------------------|--|--|------------------------|
| Delegation of Authority refresh | <ul style="list-style-type: none"> The policy and related documents are due for refresh in 2024. Preliminary revisions, based on new Procurement Risk Assessment requirements, were sent to internal stakeholders for review (October 2024). Project plan drafted. DES management reviewed policy, procedure and FAQ documents. | <ul style="list-style-type: none"> Review feedback from DES management and incorporate changes. Send revised draft policy, procedures and FAQs to internal stakeholders for review in April. Send survey to stakeholders for review and feedback in May. | July 2025 |
| Direct Buy Policy | <ul style="list-style-type: none"> The current policy and related documents are due for refresh in 2025. DES sent out two surveys to agencies and the vendor community on August 27, 2024. The surveys closed on September 19, 2024. Conducted additional jurisdictional reviews to identify counties and cities' direct buy practices. Compiled stakeholder feedback and identified major themes to address in policy revisions. Concluded analysis of the information/feedback gathered. DES Director considered and approved the proposed direct buy threshold limit options. Management concluded a review of the draft policy and related documents. The documents were revised based on further changes recommended by management. Received additional stakeholder feedback on the draft policy, procedure, FAQs, and the sample worksheet for direct buy Level 3 limit through the targeted stakeholder engagement conducted on March 18 and April 9, 2025. | <ul style="list-style-type: none"> Conduct internal discussion of feedback received on March 18 and April 9, 2025 regarding the reporting requirements, three quote system, rotation requirements, and other issue stakeholders brought to DES attention. Continue to work with DES internal stakeholders (Business Operations team within C&P, DES Communications and DES procurement training teams) to identify the operational, communication and training requirements, including additional tools to support policy implementation and promote compliance. Publish final policy and related documents by July 2025. | July 2025 |

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| Sole Source Training & SSCD User Manual (Update) | <ul style="list-style-type: none"> Working with DES Procurement Training team on developing a sole source contracts training. Concurrently revising the Sole Source Contracts Database (SSCD) user manual as it has not been updated since December of 2012. Several references in the current published manual are not accurate. There is also a need to add a section on "Filing Exempt Sole Source Contracts". Several updates to the SSCD system have caused some delays in finalizing the revised user manual. | <p>The following work to pick back up after the heavy sole source season (May-June 2025):</p> <ul style="list-style-type: none"> Review and update draft sole source training script. Make edits and additions to the SSCD user manual. | September 2025 |
| Contracting Out Manual (aka "Competitive Contracting Manual") | <ul style="list-style-type: none"> Identified impacts of HB1521 to the Contracting Out (aka Competitive Contracting) Manual. The Enterprise Procurement Policy manager completed review of the revisions to the manual proposed by the Policy Administrator. | <ul style="list-style-type: none"> The Policy Administrator is reviewing and incorporating recommended changes to the draft manual. Seek DES management approval. Send revised draft manual to target stakeholders for review and input. Finalize and publish the manual. | August 2025 |
| Procurement Guidance Document | <ul style="list-style-type: none"> On February 8, 2023, DES sent out a survey to gauge stakeholders' interest in a competitive solicitation policy. Eleven stakeholders completed the survey. 90% say a guidance document is needed on the subject and 64% prefer guidelines. Conducted the first round of internal consultation in May 2023. Based on the information received work is temporarily on hold to understand how this project overlaps with other related projects. Identified policy/guidance gaps, based on the scope of work in the procurement tools and templates project. August 26, 2024, the Policy Team drafted a Grants Guidance document. | <ul style="list-style-type: none"> Based on the gaps identified in the Procurement Manual project, DES is developing policies/guidance documents for Client Services Contracts, Interagency Agreements, Grants, Cooperative Purchasing, etc. <u>Grants Guidance document:</u> DES management and AAG review the draft guidance document. Send draft guidance to stakeholders for input. | <p>August 2025</p> <p>June 2025</p> |

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| Supplier Diversity Handbook Review for Revision | <ul style="list-style-type: none">• April 1, 2023, the Supplier Diversity Policy became effective.• The Policy Team continues to receive inquiries and suggestions to enhance the Supplier Diversity Handbook.• The Handbook was last revised in August 2024. | <ul style="list-style-type: none">• Review comments and suggestion received and revise the Handbook.• Seek management approval of revisions.• Post revised Handbook and notify stakeholders. | July 2025 |