

**M E M O R A N D U M**

**TO:** Honorable Chair and Members of the Board of County Commissioners

**FROM:** Joe Kerby, County Manager

**RE:** Amendments to Policy Part 2, Chapter 1, Section 2 Regarding Contract and Delegation Authority and Policy Manual Part 4, Chapter 6, Section 1 Regarding Purchasing Policy- Board of County Commissioners and Grants and Procurement Division

**Date:** 6/10/2025

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**Staff Recommendation:**

WHEREAS, the proposed amendments to the Purchasing Policy will implement efficiencies and alignment to the County's Enterprise Resource Planning (ERP) system, Workday, and

WHEREAS, an amendment to the Contract and Delegation Authority Policy to change the delegation to terminate purchasing contracts to the Purchasing Operations Manager will compliment a change to the Purchasing Policy.

NOW THEREFORE, BE IT RESOLVED, by the Board of County Commissioners of Jefferson County that the existing Contract and Delegation Authority Policy and the existing Purchasing Policy are hereby rescinded and replaced with the policies attached hereto effective June 10, 2025.

**Resolution CC25-147**

**Background:**

The Purchasing Policy had not been updated since 2019, despite a stated intent at that time to revisit within one year. Since then, the County transitioned from JD Edwards to Workday (early 2021), yet the policy and procedures still reference outdated JD Edwards processes. This misalignment

has led to confusion, errors, and rework.

The recommended updates presented today address these critical gaps and modernize the policy to reflect our current systems and practices.

While the current recommendations are critical and ready for implementation, we recognize that further efficiencies are possible. A future phase of updates could reduce processing times for purchase requisitions by 4 to 10 weeks, potentially saving \$300,000+ in staff time annually. The team plans to begin working on these potential changes in early 2026.

The following revisions to the Purchasing Policy are being recommended to reflect operational updates, system transitions, and improvements to clarify roles and responsibilities:

1. Naming Update

- Changed references from "Purchasing Operations" to "SIF-Procurement" to align with current organizational structure.
- Changed the policy's name from Purchasing Policy to Procurement Policy.

2. Policy Simplifications and Clarifications

- Removed the definition of "best value" to streamline terminology.
- Updated the Special Notification and Review Requirements chart.
- Clarified that the Purchasing Operations Manager is authorized to sign purchase order, change orders, and terminations.
- Updated the roles and responsibilities for receiving supplier protests, including a clear process and timelines.

3. Approval Processes and Thresholds

- Updated contract and purchase order approval threshold charts to reflect implementation of Workday, with supporting details moved to a new Appendix C of the Purchasing Procedures.
- Revised policy for Special Authority Change Orders: capped at  $\leq 10\%$  of the original value and removed the dedicated chart, with further details provided in Appendix C of the Purchasing Procedures.

4. Disaster Response Authority

- Added a reference to the Declaration of Disaster or Emergency Policy which delegates contract signature authority to the Sheriff or the Emergency Management Manager during a declared disaster or

emergency.

5. Administrative Responsibilities and Ethics

- Noted that the Procurement Card (p-card) program will now be administered by Finance instead of Procurement.
- Added language stating that individuals may be excluded from procurement activities due to conflicts of interest.
- Enhanced code of ethics to clarify expectations around financial interests.

6. Contract Termination Authority

- Delegated authority to terminate contracts to the Purchasing Operations Manager.
- This delegation required an amendment in the Contract and Delegation Authority Policy, which delegates termination authority to Division Directors. The proposed amendment for the Contract and Delegation Authority Policy specifies the Division Director has authority to terminate non-purchasing contracts.

**Fiscal Impact:** None

**BCC Briefing Presented on:** 5/13/2025

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