

**Attachment 1**  
**County of Mendocino**  
**Crosswalk for Policy 1 Revision**

Chapter	Sections	Title	Current Policy Page	Amended Policy Page	Proposed Amendments
<b>1</b>	<b>PURPOSE AND POLICY STATEMENT</b>				
	1.1	Introduction	3	5	Revised and removed references to GSA/Central Services
	1.2	Authorities	3	5	Minor revision
	1.2.1	Sources of Authority	3	5	Minor revision
	1.2.2	Priorities in Case of Conflict	3	6	Minor revision
	1.2.3	Procuring Goods and/or Services under a Federal Award		6	New section
	1.3	Definitions		6-8	New section
	1.3.1	"Aggregate Cost"		6	New section
	1.3.2	"Agreement" and "Contract"		6	New section
	1.3.3	"Consumer Price Index" or "CPI"		7	New section
	1.3.4	"County Official"		7	New section
	1.3.5	"Department"		7	New section
	1.3.6	"Executive Office Liaison"		7	New section
	1.3.7	"Family"		7	New section
	1.3.8	"Formal Procurement"		7	New section
	1.3.9	"Informal Procurement"		7	New section
	1.3.10	"Personal Property"		8	New section
	1.3.11	"Purchasing Agent"		8	New section
	1.3.12	"Purchasing Division"		8	New section
	1.3.13	"Real Property"		8	New section
	1.4	Policy Limitations	8	8	Minor revision - Current policy has this specific to contracts. New policy is broader and covers goods and services.
	1.4.1	Independent Statutory Authority		8	New section - was referred to briefly in contracting section of current policy. Expanded in new policy.
	1.4.2	Public Works Contracts		9	New section
	1.4.3	Elections Materials and Polling Places		9	New section
	1.5	Policy Accountability	12	9	Minor revision
<b>2</b>	<b>VENDOR RELATIONS AND ETHICS</b>				
	2.1	Vendor relations	7	10	No change
	2.2	Ethical Standards for Purchasing Activities; Prohibitions	7	10	Minor revision - Additional exclusion of employee to participate added - (d)
<b>3</b>	<b>REQUIREMENTS FOR CERTAIN ACQUISITIONS</b>				
	3.1	Provision of Goods and Services by the Department of Health Services and Social Services	11	12	Minor revision
	3.2	Information Technology (IT) Acquisitions		12	New section
	3.2.1	Purpose		12	New section
	3.2.2	Applicability		12	New section
	3.2.3	General Requirements		12	New section
	3.2.4	County IT Division Review		13	New section
	3.2.5	Sheriff's Office Exception		13	New section
<b>4</b>	<b>COMPETITIVE PROCUREMENT</b>				
	4.1	Solicitation Requirements - Goods and Services	7	14	Significant change
	4.2	Exemptions from Competitive Bidding Requirements - Goods and Services		14	
	4.2.1	Sole Source Procurement		14	New Section - Combines Exception to Bid into process.
	4.2.2	Single Source Procurement		15	Exception to Bid will now route with contract instead of separate document. (Allows replacement of Exception to Bid form with something electronic. Also allows separate processes for contracts vs purchases of goods.)
	4.2.3	Extension of Existing Agreements		15	
	4.2.4	Cooperative Purchases		15	
	4.2.5	Specific Service Exemptions		16	
	4.2.6	Other Exemptions		16	
	4.3	Requirements for Goods or Services Purchased with State/Federal Funds		16	New section
	4.4	Negotiating Contracts or Purchases Not Subject to Competitive Bidding	10	16	Minor revision - This language appeared in the contracts section of current policy (6.4).
	4.5	Local Vendor Preferences	8	17	No change
<b>5</b>	<b>ACQUISITIONS OF PERSONAL PROPERTY (MATERIALS, SUPPLIES, EQUIPMENT)</b>				
	5.1	Introduction	4	18	Minor revision
	5.2	Purchasing Agent/Purchasing Division's Role	4	18	Minor revision
	5.3	Limitations on Items that May Be Purchased	4	18	Significant change
	5.4	Direct Purchase Programs	5	19	Minor revision
	5.4.1	Limitations		19	New section - (in prior policy it was listed in multiple locations)
	5.4.2	Blanket Purchase Orders (BPOs)	4	20	Minor revision
	5.4.3	Direct Purchase Authority (DPA)	5	20	Minor revision
	5.4.4	Procurement Cards	5	20	Minor revision
	5.5	Requisition Forms and Purchase Orders	6	20	Minor revision

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	5.6	Purchase of Goods Utilizing State/Federal Funds		21	New section
	5.7	Advance Payments		21	New section - (is only in contracting section of current policy)
	5.8	Purchasing Fixed Assets	6	21	Minor revision
	5.9	Purchasing Computer-Related Equipment or Supplies		22	New section
	5.10	Emergency Purchases	6	22	Minor revision
	5.11	Purchases from Petty Cash Accounts	6	22	Minor revision
		Purchases of Goods through State or Multi-Agency Purchase			
	5.12	Programs		23	New section
	5.13	Incidental Services		23	New section
<b>6</b>	<b>CONTRACTS FOR PERSONAL AND PROFESSIONAL SERVICES</b>				
	6.1	Introduction	8	24	Minor revision - (broke into Introduction and Agreements Not Addressed by this Chapter, and some language moved to independent statutory authority section at beginning)
	6.2	Agreements Not Addressed by this Chapter	8	24	
	6.3	Preliminary Considerations		25	New section
	6.3.1	Name/Legal Status of Contractor		25	New section
	6.3.2	Independent Contractor Status Versus Employee Status		25	New section
	6.3.3	Contract Templates: County Boilerplate versus Non-Boilerplate		25	New section
	6.3.4	Risk Implications		25	New section
	6.4	General Requirements for All Contracts		26	New section
	6.5	Authority to Execute	9	26	
	6.5.1	Total Contracted Amount and Aggregate Cost	11	26	Significant Change - expansion of sections 6.3, 6.5, 6.6, 6.7 of current policy
	6.5.2	Authority of the Board of Supervisors	10	27	
	6.5.3	Authority of the Purchasing Agent	10	27	
	6.5.4	Authority of County Officials	10	27	
	6.5.5	Authority to Execute Amendments		28	New section
	6.6	Review, Routing, and Approval Requirements	9	29	Significant change - more detailed language to expand 6.3 of current policy
	6.6.1	Initiating Contracts and Amendments	9	29	Significant change
	6.6.2	Budgetary Compliance/Review	8	29	Minor change - (contained within section 6.1 of current policy)
	6.6.3	County Counsel Review	9	29	Significant change to language, but not a new requirement (within 6.3 of current policy)
	6.6.4	Risk Review	9	29	Significant change to language, but not a new requirement (within 6.3 of current policy)
	6.6.5	Indemnification Requirements	9	29	New section, but not a new requirement (part of Risk Review)
	6.6.6	Insurance Requirements	9	30	New section, but not a new requirement (part of Risk Review)
	6.6.7	Information Technology (IT) Approval/Review		30	New section
	6.7	Additional Considerations		31	New section. Most of these subsections document interpretation of current policy.
	6.7.1	Agreements Utilizing Federal/State Funds	11	31	Minor revision
	6.7.2	Auto-Renew Clauses		31	New section
	6.7.3	Agreements Without a Term End Date		31	New section
	6.7.4	Retroactive Agreements and Amendments		32	New section
	6.7.5	Cash Advances	11	32	Minor revision
	6.7.6	Local Emergencies as Proclaimed by the Board of Supervisors		33	New section
	6.7.7	Contracts that Include Purchases of Fixed Assets		33	New section
	6.7.8	Procurement Cards		33	New section
<b>7</b>	<b>REVENUE CONTRACTS</b>				Under review
	7.1	General Authority Limits for All Revenue Contracts	11	34	Minor revision
	7.2	Special Circumstances		34	New section
		Routine Renewal Agreements Drafted by the State of California			
	7.2.1	or the Federal Government		34	New section
		Revenue Agreements from grant Awards or Other			
	7.2.2	State/Federal Funding Sources		34	New section
	7.3	Review, Routing, and Approval Requirements		34	New section, but not a new requirement under interpretation of current policy.
<b>8</b>	<b>MAINTENANCE RENTALS AND LEASES OF EQUIPMENT AND OTHER PERSONAL PROPERTY</b>				
	8.1	Authority to Execute	12	35	Minor revision
	8.2	Additional Considerations		35	New section

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	8.3	Review, Routing, and Approval Requirements		35	New section, but not a new requirement under interpretation of current policy.
<b>9</b>		<b>REAL PROPERTY</b>			
		Leases of Real Property Where the County is the Tenant			
	9.1	(Lessee)		36	New section
	9.1.1	Authority to Execute and Procedural Requirement	12	36	Significant Change
	9.1.2	Additional Requirements		36	New section
	9.1.3	Renewals		37	New section
	9.1.4	Event Rentals	12	37	Significant Change
		Leases of Real Property Where the County is the Landlord			
	9.2	(Lessor)	12	37	Significant Change
	9.2.1	Authority to Execute		37	New section
	9.3	Retroactive Leases		37	New section
	9.4	Review, Routing, and Approval Requirements		37	New section, but not a new requirement under interpretation of current policy.