

STRATEGIC PROCUREMENT ASSESSMENT AND RELATED SERVICES

For



Prepared for:
DeKalb County
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Submitted by:

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Introduction

NIGP Consulting is pleased to submit this Statement of Work to DeKalb County ("County") for Strategic Procurement Assessment and Related Services. The Services will include:

- A. Strategic Procurement Assessment
- B. Procurement Policies and Procurement Procedures Development / Revision
- C. Process Mapping

The specific scope of work for the Project is defined below.

I. Statement of Work

A. Strategic Procurement Assessment

NIGP Consulting shall provide Strategic Procurement Assessment Services to address the effectiveness of the DeKalb County ("County") procurement function, to include:

- 1. Procurement Policy and Process Review
- 2. Customer Service Level Review
- 3. Small, Local Business Program Assessment
- 4. Procurement Organizational and Staff Analysis
- 5. Benchmark Survey

1. Procurement Policy and Process Review

NIGP Consulting will conduct a high-level review of all applicable state and local policies and procedures to gain an in-depth understanding of the existing environment, to establish compliance, to identify potential impediments and inefficiencies in existing procurement policy and process, and to develop recommendations for policy and process improvements to align with industry best practices in public procurement. The review will include the following:

- Review of applicable state and local ordinances, statutes, legislation, policies, and administrative manuals
- Review of current procurement processes and procedures for: a) Identification of needs for goods and services; b) Specifications of identified needs for goods and services to be procured; c) Requisitions for purchases; d) Solicitations (sourcing methods); e) Evaluation of solicitations; f) Award of solicitations; g) Contract administration; and h) Record keeping.
- Identify potential policy improvements in alignment with global procurement best practices, industry standards and ABA Model Procurement Code.
- Identify process efficiency opportunities as well as note deviations from procurement industry best practices.
- Document a comparative analysis against ABA Model Procurement Code.

2. Customer Service Level Review

NIGP Consulting will conduct a high-level review of current customer service levels for



identification of improvement opportunities for alignment with industry best practices. This portion of the review is intended to gain a thorough understanding of stakeholder perception of the procurement process, their role in the process, and the level of customer service satisfaction. This portion of the review is achieved through interviews of key stakeholders to determine current needs, current level of support, level of satisfaction with support, key challenges, and identification of opportunities for improvement to enhance customer service for internal and external stakeholders, as well as to propose customer satisfaction measures.

3. Procurement Organizational and Staff Analysis

NIGP Consulting will conduct a high-level review and analysis of the procurement organizational structure, operational structure as well as roles and responsibilities of current staff to provide recommendations for increased effectiveness, efficiency and alignment of roles and responsibilities particularly in relations to support the needs of the organization.

4. Small, Local Business Program Assessment

NIGP Consulting will conduct a high-level assessment of the County's Small, Local Business Program for effectiveness, efficiency, compliance and alignment with industry best practices. A report will be generated to provide observations, analysis and recommendations for short, mid and long term program improvements. A draft of the report will be provided to the County for review and comment, prior to the issuance of a final report.

5. Benchmarking Comparable Agencies

NIGP Consulting conducts a benchmark analysis against two or more comparable Counties or Cities. Benchmarking compares defined elements of practices, policies, organizational structure, and metrics between County and other agreed upon Counties or Cities. The results of the benchmark will be leveraged to provide perspective on the recommendations in the report and comparative analysis between the similar entities.

Deliverables: Prior to NIGP Consulting's commencement of the work, the County Project Manager and designated the County staff shall meet virtually with NIGP Consulting to ensure understanding of the Scope of Work and the Deliverables specified in the Contract. NIGP Consulting shall conduct virtual Staff Interview(s) and present a Draft Project Report of Recommendations to the County Project Manager for review and comment. Upon return of the Draft Project Report by the County with comments within 2 weeks, a Final Project Report will be delivered to the County Project Manager within 3 weeks. A final project review session may be held online with the County Project Manager and designated the County staff upon request.



B. Procurement Policies and Procurement Procedures Development/Revision

Subsequent to the Procurement Policy and Procurement Procedures Review performed as part of the Strategic Procurement Assessment, NIGP Consulting will develop and/or revise the County's procurement policy and procurement procedures documents. The County will be required to make decisions on the high-level procurement policy and procurement procedures recommendations provided under the Strategic Procurement Assessment. NIGP Consulting will conduct any additional discovery, potentially including additional interviews (virtually) related to a more in-depth analysis of policy and procedures.

NIGP Consulting shall perform the following tasks:

- 1. Meet with the County Project Manager and appropriate County team members to ensure a mutual understanding of the Project, to discuss expectations and goals, and to discuss roles and responsibilities for the respective team members.
- 2. Conduct any additional interviews with identified County stakeholders to assess the current state of the County's procurement policy and procurement procedures.
- 3. Develop a Draft Procurement Policy Outline and a Draft Procurement Procedures Outline, including identification of proposed format and structure for both deliverables, to include visual presentation and numbering structure.
- 4. Ensure separate Procurement Policy and Procurement Procedures documents are sufficient to guide entity employees on all aspects of procurement policy and procurement procedures at the County.
- 5. Develop a detailed Procurement Policy Report providing recommendations on opportunities for improvement to existing County procurement policy, identifying areas where there are opportunities for enhanced, clarified, and streamlined policies for greater effectiveness and efficiency.
- Develop a detailed Procurement Procedures Report providing recommendations on opportunities for improvement to existing County procurement policy, identifying areas where there are opportunities for enhanced, clarified, and streamlined policies for greater effectiveness and efficiency.
- 7. Meet with County Project Manager and appropriate team members to discuss recommendations in the Draft Recommendations Reports to obtain from County identification of and approval for those changes desired to be incorporated into the revised Procurement Policy and Procurement Procedures documents.
- 8. Develop a Draft Procurement Policy and a Draft Procurement Procedures Manual for the County to review and comment on.
- 9. Meet with County Project Manager and appropriate County team members to discuss feedback on Draft Procurement Policy and Draft Procurement Procedures Manual. Revise documents taking feedback from County into consideration.
- Present the final Procurement Policy Report and the final Procurement Procedures Manual to County. Presentation to be conducted virtually, however, NIGP



Consulting does have the ability to travel and present in person upon request. Presentation projected at one hour or less, and inclusive of preparation of material in coordination with County Project Manager.

NIGP Consulting will work with the County Project Manager to ensure clarity of expectations, address issues and concerns during the Project, and provide updates on project progress. Meetings will be conducted virtually or via conference calls on a mutually agreeable schedule. NIGP Consulting will rely on the County to:

- 1. Provide existing documentation in electronic format.
- 2. Identify and coordinate interviews with defined stakeholders relevant to the Project of the current state of procurement at the County.
- 3. Be available for questions and clarifications, as well as assistance in facilitation of the interviews, the deliverables and broad support.
- 4. Review all deliverables and provide comments within the agreed upon schedule.
- 5. Secure approvals from appropriate County officials for any changes desired (based upon NIGP Consulting recommendations) desired to be included in the new policy.

Deliverables: NIGP Consulting shall provide a Draft Procurement Policy and Procurement Procedures Manual Outline, a Draft Report of Recommendations, a Draft Procurement Policy and Procurement Procedures Manual (Version 1.0 and potentially Version 2.0) and a Final Procurement Policy and Procurement Procedures Manual to the County Project Manager for review and comment. A final project review session may be held online with the County Project Manager and designated County staff upon request.

All deliverables will be provided in Word and pdf format. Any required formatting of the deliverable relative to structure, images, title, numbering, references, and any other style specific requirements of the County shall be identified during the initial meeting with the team.

C. Process Mapping - Current State Discovery and Future State Recommendations

NIGP Consulting will create process maps of current and future state procurement processes using Lucent Chart. Process mapping sessions will be conducted on-site, and will include discovery, interviews and detailed process mapping exercises with designated procurement stakeholders. Process maps will document current-state actions, decision points, roles, documents, data, metrics, approvals, and systems/technology for each identified procurement process. Up to 12 Procurement processes will be mapped and may include: a) requisitions, b) purchase orders, c) change orders, d) Invitation for Bid, e) Request for Proposal, f) contracts, and g) contract amendments. Draft process maps will be shared with the County for input and verification.



Upon completion of the current state process maps, a gap analysis will be conducted to identify opportunities for improvements from current state to the desired future state based upon:

- ABA Model Procurement Code
- Global best practices for public sector procurement
- Data collected during discovery, interviews and process mapping sessions.

In addition to the process maps, recommendations will be provided on proposed future state policy and procedure changes, delivered in a Report of Recommendations. The County will have an opportunity to review, discuss and make decisions on those changes desired for modification. Up to 12 processes will be mapped and documented for current processes.

Deliverable: NIGP Consulting shall provide up to 12 process maps using Lucent Chart of the current process and a Report of Recommendations for the County to review and make decisions. Based on the County's feedback, the future state maps will be drafted for the County to review and provide feedback. The final future process maps will be provided based on the County's feedback. (Optional: A presentation may be conducted virtually or in-person, at the County's request. Any in-person presentations will incur travel and will be invoiced in addition to the price. Presentation will be one hour and inclusive of preparation of material in coordination with the County Project Manager.)

III. Schedule

A. Strategic Procurement Assessment

- Initial Preparation Phase document request and review (2 weeks)
- Interviews (2 week)
- Benchmark Survey (2 weeks)
- Analysis Phase review and analysis of all data gathered (4 weeks)
- Draft Report Phase (4 6 weeks)
- Agency Review/Comment (2 weeks)
- Final Report (2 weeks)
- Total Project Timeframe: 18 -20 weeks

B. Procurement Policy & Procurement Procedures Development/Revision

- Initial Preparation Phase document request and review (1 week)
- Interviews (1 week)
- Analysis Phase review and analysis of all data gathered (6 weeks)
- Outline & Recommendations Report (2 weeks)
- Draft Deliverables (Policy & Procedures) (6 weeks/each)
- Agency Review/Comment (2 weeks)
- Final Deliverables (Policy & Procedures) (2 4 weeks)
- Total Project Timeframe: Policy = 18 weeks; Procedures = 22 weeks



C. Process Mapping

- Initial Preparation Phase document request and review (2 weeks)
- Discovery Sessions (3 days on-site; depends on number of processes)
- Current State Process Maps (4 weeks; dependent upon number of processes mapped)
- Review of Maps w/Client (2 weeks)
- Future State Process Maps (3 weeks; dependent upon number of processes mapped)
- Agency Review/Comment (2 weeks)
- Final Process Maps (3 weeks; dependent upon number of processed mapped)
- Total Project Timeframe: 16 -18 weeks

Note: Schedules for all of the above projects are dependent upon the order of the projects. Efficiencies will be derived if there is a decision to proceed more than one project. As such, final scheduling will leverage overlaps in activities and multiple team members. A final project schedule will be determined with the County.

IV. Client Provided Support

A. Strategic Procurement Assessment

Document and Request – document gathering: enabling legislation, policies and procedures, strategic plans, client and procurement organizational charts, and procurement performance metrics (anticipated time: 2-4 hours/project)

Interviews – logistical assistance: scheduling client department meetings, procurement staff meetings (anticipated time: 3 hours support/project)

Draft Report/Final Report – additional document requests, review/comments on draft report (anticipated time: 16 - 24 hours/project)

Other requirements of the Client may be determined during the Kick Off meeting after award.

B. Procurement Policy and Procurement Procedures Revision

- Provide all applicable state and local ordinances, statutes, legislation, policies and procedures in electronic format.
- Be available for questions and clarifications.
- Provide access to all required systems. Consultant will use NIGP Consulting email address for all work communication, unless otherwise agreed upon with the County.

C. Process Mapping

- Provide all applicable documentation related to the applicable processes including, but not limited to, policies and procedures in electronic format.
- Identify and assign key personnel to participate in interviews.
- Coordinate logistics (schedule and reserve staff and meeting location).
- Actively participate in required process mapping activities.



- Be available for questions and clarifications.
- Cooperate in identifying additional data that is required or desired

V. rProject Costs

NIGP Consulting is pleased to offer the firm fixed price for each of the following services:

A. Strategic Procurement Assessment: \$93,400

B. Procurement Policy and Procurement Procedure Revision: \$97,400

C. Process Mapping (Up To 12 Processes): \$99,800

If applicable, travel expenses will be invoiced at cost, in addition to the contracted pricing. Travel expenses must be approved in advance by the entity and will be based upon NIGP Consulting's travel policy, unless otherwise specified to be in alignment with the entity's travel policies. Travel related expenses will include, at a minimum, airfare, hotel accommodations, mileage (if not flying to site), local transportation (rental car or transportation services), parking and mileage to/from Consultant's base location, luggage fees, per diem and miscellaneous related travel expenses.

\$80/day (maximum) Per Diem .62/mile Mileage

VI. Billing

The County will be billed as follows for each Project:

- A. <u>Strategic Procurement Assessment</u>: 40% upon completion of the interview phases, 40% upon delivery of the draft report and 20% upon delivery of the final report.
- B. <u>Procurement Policy and Procurement Procedures Revision</u>: 30% upon completion of Draft Recommendations Report & Outline Documents, 40% upon completion of Draft Policy/Draft Procedure, 30% upon completion of Final Policy and Final Procedures
- C. <u>Process Mapping</u>: 30% upon completion of Discovery/Current State Mapping Sessions, 40% upon completion of Final Current State Maps, 30% upon completion of final State Maps.

Billing will be based on deliverable completion without the County sign-off of each deliverable – billed as fixed fee. Terms for all undisputed invoicing will be Due Upon Receipt.



Acceptance of a Deliverable will occur within 10 days after receipt by the County unless the County notifies Periscope of a Defect within such time period. In the event the Deliverable(s) provided to the County do not meet requirements, Periscope shall have five (5) business days to cure such Defect.

A project plan will be agreed upon prior to kickoff and Periscope, subsequently, will allocate resources in order to successfully meet the project deadlines and to control costs. the County is expected to meet project deadlines as well. If actions (or inactions) on the part of the County result in a project delay, and it becomes necessary for NIGP Consulting to reschedule or reallocate resources, the cost of the project might escalate requiring a change order. Further, it is NIGP Consultant's expectation that the County agrees to performance completion for the entire consulting engagement as outlined in the scope of work.

VII. STATEMENT OF QUALIFICATIONS AND EXPERIENCE

NIGP Consulting – Consulting Team Qualifications

Our consultants are current and former public procurement practitioners. Their experience and expertise are based upon their leadership and executive positions with government entities as well as their service as consultants under contracted engagements.

Based upon their individual and collective experience in public sector procurement, procurement leadership and extensive engagement in the public procurement community, our Consulting Team brings progressive experience in:

- Goods, services, design, and construction contracting.
- Acquisitions, inventory management and supply chain logistics.
- Large and complex project tasks, including planning, specification and scope of work development, market research, cost and price analysis, negotiations, contractor performance assessment, contract management and contract closeout.
- Best practices in public procurement.
- Procurement technology and solutions, including Word, Excel, PowerPoint, and Outlook.
- Oral and written communication skills.
- Project management, including schedule and budget management.
- Expert advice and guidance to senior level staff members.

Our Consulting Team understands that every public organization has a unique culture. As a team, we gather information on the goals of the organization for the engagement as well as on the culture of the organization. We are prepared to bring immediate value, including implementing specific best practice procurement and contracting strategies for the entity to assist in your operation. Our team is experienced with the dynamics of political environments.



Further, we recognize the importance of establishing standard tools and templates to ensure consistency throughout complex procurement and contracting functions. NIGP Consulting maintains confidentiality, focusing on developing close client relationships and building trust with your entity team.

NIGP Consulting -- Corporate Qualifications

NIGP Consulting was formed in 1995 by NIGP – The Institute of Government Procurement (founded in 1944). NIGP is a public procurement association providing advocacy, development, and support of over 17,000 public procurement practitioner members throughout North America. Its membership encompasses over 2,600 government entities and 72 public procurement chapters. NIGP Consulting is managed by President of Consulting, Marcheta Gillespie, FNIGP, NIGP-CPP, CPPO, C.P.M., CPPB, CPM.

In 2008, NIGP outsourced the management of NIGP Consulting to Periscope Holdings, Inc. NIGP, though, continues to be the owner of NIGP Consulting. Founded in 2001 and acquired by mdf commerce in 2021, Periscope Holdings, Inc. has invested more than two decades in developing, implementing, and supporting eProcurement solutions for state and local governments. Periscope has been at the forefront of delivering best-of-breed eProcurement solutions to public sector organizations across North America.

NIGP Consulting – Market Differentiators

The NIGP Consulting program is truly unique:

- We are single-minded in purpose and focus on the transformation and advancement of public procurement.
- All clients are public sector procurement organizations.
- Each of our consultants has hands-on experience performing critical procurement and contracting functions within public sector organizations.
- We ensure that the Public Procurement Values of Accountability, Ethics, Impartiality,
 Professionalism, Service and Transparency are engrained in every aspect of our work,
 our deliverables, and our relationships. (In fact, we helped establish these Values as
 well as the subsequent Best Practices of Public Procurement for our industry.)
- We are committed to helping all public procurement entities transform into centers of procurement excellence.
- We passionately live our mission: Procurement Professionals Delivering Results.
- **NIGP** is the name you can trust in public sector procurement.

A hallmark of the NIGP Consulting program is the unmatched level of expertise in the public procurement industry among our team members. The NIGP Consulting program, in existence since 1995, has conducted procurement analyses, reviews and provided procurement support



services for over 150 public sector clients.

Additionally, our team of professionals possess an abundance of knowledge and leadership experience through their roles in the public procurement industry. This directly facilitates a thorough understanding of unique circumstances and raises the bar on our effectiveness.

NIGP Consulting – Client Engagement

Below is a sampling of the public entities we have completed projects for over the past 15 years. These engagements offer evidence of the breadth of knowledge, experience, and capability of the NIGP Consulting Program to deliver superior consulting services in the public sector.

	NIGP CONSULTING CLIENT LIST					
•	Alachua County, FL	•	Howard County, MD			
-	Anchorage School District, AK	•	Imperial Irrigation District, CA			
•	Arlington County, VA	•	Long Beach Port Authority, CA			
-	Atlanta Housing Authority, GA	•	Loudoun County, VA			
-	Atlanta Public Schools, GA	•	Manatee County, FL			
•	Austin School District, TX	•	Maricopa County, AZ			
•	CalOptima Integrated Health	•	Mecklenburg County, NC			
•	Cecil County, MD	•	San Antonio Water System, TX			
•	Cincinnati Go Metro, OH	•	Milwaukee County, WI			
•	City of Annapolis, MD	•	Montgomery County, OH			
•	City of Austin, TX	•	Nashville International Airport, TN			
-	City of Dallas, TX	•	Nassau County, FL			
•	City of Deerfield, FL	•	New Braunfels Utility, TX			
•	City of Denton, TX	•	Orange County, CA			
-	City of Ft. Worth, TX	•	Pima Community College, AZ			
-	City of Gainesville, FL	•	San Joaquin Delta College, CA			
-	City of Hamilton, ON	•	San Diego County, CA			
-	City of Kirkwood, MO	•	San Mateo County, CA			
-	City of Stockton, CA	•	Seminole County, FL			
-	City of Long Beach, CA	•	Seminole State College, FL			
-	City of Miami Beach, FL	•	Snohomish County, WA			
-	City of North Miami Beach, FL	•	St. Louis County, MO			
-	City of Orlando, FL	•	St. Mary's Metro County Commission			
•	City of Palo Alto, CA	•	State of IL Capital Improvement Brd			
•	City of Pittsburgh, PA	•	State of Maine			
•	City of Roseville, CA	•	State of Maryland			
•	City of San Antonio, TX	•	State of Michigan			
	Columbus City School District	•	State of Nevada			
	DC Public Schools	•	State of Oregon Treasury			
	Fairbanks North Star Borough	•	State of Washington			
•	Golden Gate District Authority	•	Suffolk County, NY			



•	Houston County, TX	•	Town of Hollywood, FL
•	El Paso County, TX	•	University of North Carolina, NC
•	City of Scottsdale, AZ	•	Virginia Commonwealth University

VIII. Offer and Acceptance

The County agrees that it shall not refer to the Services by NIGP Consulting in any marketing or promotional materials without the express approval by Periscope. The County shall have the right, for informational purposes, to state the fact that NIGP Consulting has been/was engaged to provide the Services. Periscope retains the right to list the County as a client and may request a written testimonial or reference from the County for the work performed.