CONSOLIDATED FIRE AGENCIES
POLICIES OF THE BOARD OF DIRECTORS

POLICY:	BP 4.004
TITLE:	Procurement Policy
ADOPTED:	[4.29.2021]
REVISED:	[11.17.2026]

1. PURPOSE

This policy establishes the procurement methods used by CONFIRE for commodities, non-professional services, professional services, private ambulance services, and public works. The purpose of this policy is to provide a clear, consistent process for selecting the appropriate procurement method while promoting competition, transparency, efficiency, and responsible use of public funds.

2. GENERAL PROCUREMENT PRINCIPLES

- Procurement method is determined by the type of procurement and the applicable annual threshold.
- Procurement method and contracting/signature authority are separate requirements. Compliance with a procurement method does not, by itself, authorize execution of a contract.
- Contracting and signature authority shall be governed by BP 4.003, Contracts, Loans, Checks and Deposits, and any other authority specifically delegated by the Board of Directors.
- Procurements shall not be split, phased, or otherwise structured for the purpose of avoiding a solicitation or approval threshold.
- Departments should engage Finance/Procurement early when the appropriate procurement method is unclear or when a procurement is expected to cross a threshold.

3. HOW THRESHOLDS ARE CALCULATED

Unless a different method is required by law, the thresholds in this policy are measured on an annual basis. For recurring or multiyear purchases and contracts, the applicable procurement method is based on the anticipated annual amount, not the aggregate value over the full contract term.

- For a one-time purchase or project, the threshold is based on the total anticipated amount of that purchase or project.
- For recurring purchases from the same vendor and/or same scope of work, substantially similar purchases shall be aggregated on an annual basis.
- For multiyear contracts, the highest reasonably anticipated annual amount shall be used when determining the procurement method.
- Renewals, extensions, amendments, or change orders may not be used to circumvent the procurement method that would otherwise apply.

4. CONTRACT TERMS

Contract term limitations and approval requirements are governed by **BP 4.003 – Contracts, Loans, Checks and Deposits**. Contract terms are separate from the procurement thresholds and solicitation requirements established by this policy.

5. PROCUREMENT METHOD QUICK REFERENCE

Procurement Category / Annual Threshold	Required Method
Commodities & Non-Professional Services — Up to $35,000	Open Market
Commodities & Non-Professional Services — $35,001–$75,000	Informal Solicitation (RFQ)
Commodities — $75,001 and over	Formal Solicitation (RFB)
Non-Professional Services — $75,001–$150,000	Formal Solicitation (RFB)
Non-Professional Services — $150,001 and over	Formal Solicitation (RFP)
Professional Services — Up to $150,000	Open Market / Qualifications-Based Selection, as applicable
Professional Services — $150,001 and over	Formal Solicitation (RFP)
Private Ambulance Services — Any Amount	Formal Solicitation (RFP)
Public Works / Public Projects — $75,000 or less	Force account, negotiated contract, or purchase order, as permitted by CUPCCAA
Public Works / Public Projects — $75,001–$220,000	CUPCCAA Informal Bidding
Public Works / Public Projects — Over $220,000	CUPCCAA Formal Bidding

Public works thresholds shown above reflect current CUPCCAA limits and shall be interpreted consistent with Public Contract Code section 22032, as amended. If statutory limits change, the statutory limits control.

6. PROCUREMENT TYPES AND PROCEDURES

A. OPEN MARKET — COMMODITIES & NON-PROFESSIONAL SERVICES UP TO $35,000

Open Market procurements are noncompetitive. Departments may select a vendor based on qualifications, prior experience, market research, availability, or other reasonable business considerations. Comparative shopping is encouraged when practical to obtain the best value.

- The department identifies the vendor and obtains appropriate pricing documentation.
- The department submits the required purchasing documentation to Finance/Procurement.
- Finance/Procurement reviews the request for completeness and confirms the procurement falls within the Open Market threshold.
- Vendor setup, tax documentation, purchase order requirements, and payment controls are governed by applicable Finance procedures and are not determinative of the procurement method.

B. REQUEST FOR QUOTE (RFQ) — COMMODITIES & NON-PROFESSIONAL SERVICES $35,001–$75,000

An RFQ is an informal competitive solicitation. At least three viable quotes should be solicited when reasonably available.

Requesting Department Responsibilities:

- Submit a purchase requisition identifying funding and the estimated or not-to-exceed amount.
- Provide a line-item list and specifications, as applicable.
- Provide known vendor contacts the department would like invited to participate.

Finance/Procurement Responsibilities:

- Review the request for completeness.

- Prepare and issue the RFQ using the agency's solicitation system or other approved method.
- Conduct vendor outreach and monitor solicitation activity.
- Review responses and identify the lowest-priced quote that meets all solicitation requirements and is submitted by a responsible vendor, when price and conformance to specifications are the primary award criteria.
- Document the award and complete the applicable purchasing process.

C. REQUEST FOR BID (RFB)

An RFB is a formal competitive solicitation used when specifications can be clearly defined and award can be made primarily on price and responsiveness.

Applies to:

- Commodities — $75,001 and over.
- Non-Professional Services — $75,001 through $150,000.

Procedure:

- The requesting department provides the purchase requisition, funding, specifications, line-item requirements, and known vendor contacts.
- Finance/Procurement prepares and posts the RFB for at least ten full business days unless a different period is authorized or required.
- After closing, Finance/Procurement reviews bids for responsiveness and identifies the lowest responsive and responsible bidder.
- If the requesting department recommends an award other than to the responsive and responsible bidder offering the lowest price, written justification is required, and the award must be otherwise permissible.
- The requesting department and Finance/Procurement complete any required agreement, staff report, insurance, licensing, and award documentation.
- Approval and signature follow BP 4.003 and other applicable delegated authority.

D. OPEN MARKET / QUALIFICATIONS-BASED SELECTION — PROFESSIONAL SERVICES UP TO $150,000

Professional services with an anticipated annual amount of $150,000 or less may be procured through an Open Market process. The requesting department may identify a qualified provider based on demonstrated competence, qualifications, experience, references, availability, and the provider's ability to perform the required services. Finance/Procurement is available to assist or conduct a more formal process at the department's request.

- The department documents the basis for vendor selection and confirms that pricing is fair and reasonable.
- The department completes any required conflict-of-interest disclosure, reference checks, scope of work, and agreement documentation.
- Finance/Procurement reviews the procurement for completeness and routes it for approval in accordance with BP 4.003.
- Multiyear agreements are permitted subject to Section 4 of this policy.

Architectural, Engineering, Land Surveying, and Other Statutorily Covered Services:

When California law requires qualifications-based selection, the agency shall select the most highly qualified provider based on demonstrated competence and professional qualifications and negotiate a fair and reasonable price. If a satisfactory agreement cannot be negotiated, negotiations shall be formally ended before proceeding to the next most qualified provider.

E. REQUEST FOR PROPOSAL (RFP) — PROFESSIONAL & NON-PROFESSIONAL SERVICES $150,001 AND OVER

An RFP is a formal competitive solicitation used when award should be based on qualifications, approach, experience, service quality, price, and/or other evaluation criteria rather than price alone.

Requesting Department Responsibilities:

- Submit a purchase requisition identifying funding and the estimated or not-to-exceed annual amount.
- Provide a complete scope of work or services.
- Provide the evaluation criteria to be used to rate proposals.

- Provide known vendor contacts to be included in outreach.
- Identify three staff members, when practical, to serve on the evaluation committee.
- Provide standardized questions if interviews, presentations, or demonstrations may be used.
- After selection, prepare or assist with the agreement and staff report, as applicable.

Finance/Procurement Responsibilities:

- Review the request for completeness and conduct vendor outreach.
- Draft the RFP in coordination with the requesting department and post the final solicitation.
- Coordinate the evaluation process and provide rating materials and instructions to evaluators.
- Review proposals for responsiveness and compile evaluation results.
- Coordinate interviews, presentations, or demonstrations when used.
- Document the final ranking and procurement process.
- Route the proposed award for approval and signature in accordance with BP 4.003 and other applicable delegated authority.

F. SPECIAL SERVICES — PRIVATE AMBULANCE SERVICES

Private ambulance services require a formal RFP regardless of amount.

Evaluation criteria shall include, as applicable:

- Experience and history providing emergency ambulance services safely and efficiently.
- Managerial experience and qualifications of key personnel.
- Effectiveness of operational processes and assets, including fleet, equipment, dispatch, customer service, and working conditions.
- Performance monitoring and quality control.
- Reasonableness of service rates and charges.
- Financial and operational ability to maintain uninterrupted service.
- Wages, staffing, and employee benefits.
- Mechanisms for effective communication with CONFIRE and any employee organization representing vendor employees.

The requesting department and Finance/Procurement shall otherwise follow the RFP responsibilities in Section 6.E, including evaluation, documentation, agreement preparation, and required governing-body approval.

G. PUBLIC WORKS / PUBLIC PROJECTS — CUPCCAA

Public works and public projects shall be procured in accordance with the California Uniform Public Construction Cost Accounting Act (CUPCCAA), Public Contract Code section 22000 et seq., when applicable.

- $75,000 or less — may be performed by force account, negotiated contract, or purchase order as permitted by CUPCCAA.
- $75,001 through $220,000 — may be let by CUPCCAA informal bidding procedures.
- Over $220,000 — shall be let by formal bidding procedures unless another statutory exception applies.
- Prevailing wage, contractor registration, bonding, and other public works requirements are separate from the procurement threshold and shall be applied when required by law.

7. EXCEPTIONS AND SPECIAL CIRCUMSTANCES

The following circumstances may warrant an alternative procurement process when permitted by law and approved under applicable agency authority. The basis and justification for the exception shall be documented in the procurement file.

- **Software Maintenance and Support:** Software maintenance, support, subscriptions, upgrades, or related services obtained directly from the software manufacturer, publisher, or other source with exclusive rights to provide the required service may be procured without a competitive solicitation when competition is not reasonably available.
- **Sole Source/Non-Competitive Procurement:** A procurement that would otherwise require competition under this policy may be made without competitive solicitation when Finance determines that competition is not reasonably available or practicable. Such circumstances may include, but are not limited to:
    - Goods or services available from only one source;

    - Compatibility with existing equipment, systems, or technology;
    - Proprietary products or services; or
    - Other circumstances where competitive solicitation would not reasonably result in meaningful competition.
- **Limited Competition:** When a competitive solicitation results in only one responsive and responsible quote, bid, or proposal, the Agency may proceed with an award when Finance/Procurement determines that adequate competition was solicited, the price is fair and reasonable, and the award is in the Agency's best interest.
- **Unsuccessful Competition:** When a competitive solicitation results in no responsive and responsible quotes, bids, or proposals, Finance/Procurement may authorize resolicitation, negotiation with one or more prospective vendors, or another appropriate procurement method.
- Nothing in this section waives any approval or signature requirement under BP 4.003.
- Finance/Procurement may require additional documentation when necessary to support the basis for an exception.

8. PURCHASE ORDERS AND ADMINISTRATIVE CONTROLS

Purchase order requirements, vendor setup, W-9 collection, insurance verification, payment documentation, and other administrative controls shall be established through Finance procedures. These controls do not change the procurement method required under this policy.

9. ROLES AND RESPONSIBILITIES

Requesting Departments:

- Define the business need and scope/specifications.
- Identify funding and submit complete procurement documentation.
- Participate in vendor evaluation and contract development.
- Avoid commitments to vendors before required procurement and approval steps are complete.

Finance/Procurement:

- Determine or confirm the applicable procurement method.
- Assist departments with solicitations and vendor outreach.
- Maintain procurement documentation and support consistent application of this policy.
- Route awards and agreements for the approval and signature required by BP 4.003.

10. POLICY INTERPRETATION

Finance is responsible for administering this policy and may issue procedures, forms, and guidance necessary for its implementation. If this policy conflicts with applicable law, the law controls. If a procurement presents circumstances not addressed by this policy, Finance shall determine the appropriate procurement process in consultation with legal counsel or the applicable approving authority when necessary.

Version	Date	Description of Changes
1.0	4/29/2021	Original policy adopted.
1.1	4/21/2022	Updated procurement procedures.
2.0	11/17/2026	Comprehensive policy revision; updated thresholds, delegated authority, and contract requirements.