



City of College Park Purchasing Policies and Procedures Manual

Adopted: Monday, June 7, 2021

Mayor: Bianca Motley Broom

Purchasing Policies and Procedures Manual Amendment(s)

1. [October 18, 2021 \(Multi-year contract awards\)](#), to be able contract services from one-year to multi-year contracts with the same vendor. Annual City services, should be considered for a 3-year contract with two optional 1-year renewals, for a total of up to five (5) years for the service(s). By increasing the contract term(s), the City would receive better annual cost savings because the service(s) would be secured into the contracted amount
2. [August 15, 2022 \(Section XII – Bond & Insurance\)](#), to clearly outline process governing when payment and performance bonds are legally required for all construction contracts exceeding \$5,000.00. In addition, the policy amendment requires purchasing to submit all payment and performance bonds to the City Attorney for review and approval.
3. [August 21, 2023 \(Section XII – Bond & Insurance\)](#), to clearly outline the process when payment of performance bond is legally required, striking Financial Size Category of XII or better from policy (Letter C Sureties).

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PURPOSE

The purpose of these policies is to recommend the manner in which the City of College Park (“City”) shall control the purchase of materials, supplies, equipment, and certain contractual services of the City, and to maintain a high ethical standard for all officers and employees of the City in connection therewith. These internal policies and procedures are designed to explain and facilitate understanding of the functions, policies and procedures of the Purchasing Department and to serve as a tool in personnel training.

Departments/Divisions must keep a current copy of the City Purchasing Policy, which includes these policies and procedures, and any official updates and applicable memos issued by the Purchasing Department.

Procedures contained herein are applicable to all City personnel involved in the requisitioning, procuring of goods and services, receiving, transferring and replacement of supplies, materials, services, equipment, and invoice processing. At times, the Purchasing Department may try new innovative procedures not described below. These can be tested on a trial basis until the procedures are finalized and approved by the City Manager and/or Mayor and Council.

SCOPE

The scope of this manual shall encompass all normal operating purchasing policies and procedures including purchasing transactions as well as the disposition of property. It has been developed within the guidelines of Georgia Statutes and customized for the efficiency and effectiveness of the City of College Park. Any situation not covered by this manual, must be presented to (a) Finance Director, (b) City Manager, or (c) the Mayor and City Council for approval.

This manual and all future amendments will be distributed to all departments and employees, operating under the City of College Park, who would be involved in the purchasing process. It can also be distributed to other organizations upon request. It is the responsibility of the department head to keep an up-to-date copy available to all employees who use the City Purchasing System. It will be the responsibility of the Finance Director and /or the Purchasing Department to distribute copies of this manual and all future amendments to the appropriate parties.

DEFINITIONS

The following definitions provide concise, comprehensive information concerning procurement terminology.

Addendum: An addition or supplement to a document, for example, items or information added to a procurement document and/or bid proposal.

Award: Mayor and Council approval of a final bid or a proposal.

Bid: A competitive price offer made by an intended seller, normally by written notice, offered as a result of a formal invitation to prospective vendors.

Bid Acceptance: The unconditional receipt of the bid at the designated bid location within the timeframe and conditions set in the bid document. Any alterations to the bidder’s offer after the close of the bid or any deviations from the conditions set in the bid document may result in the rejection and removal of the bid.

Bid Bond: Each Bid must be accompanied by a Bid Guarantee in an amount of not less than five percent (5%) of the amount of the bid.

Bid Opening: The process of opening and reading bids conducted at the time and place specified in the Request for Proposal and/or advertisement and in the presence of all who wish to attend.

Blanket Purchase Order: A blanket purchase order is one issued for the purchase of items of materials, supplies, parts, etc., for using divisions in instances where the quantity of apportionment cannot be anticipated, or where it is not practical or feasible to provide adequate storage.

College Park Business Tax Receipt: All businesses with a physical base of operations within the City of College Park limits are required to register with the City, pay the City local business tax annually, and display a current City of College Park Business Tax Receipt.

Capital Improvement Project: Any public improvement which the City undertakes, including the construction or reconstruction in whole or in part, of any building, road, highway, street improvements, physical plant, structure, or facility necessary in carrying out the functions of City government.

Certificate of Insurance: A document that is provided by the contractor/consultant to show proof of insurance according to the county requirements.

Certificate of Non-Collusion: A statement signed by a bidder and submitted with his bid affirming that this bid is made freely, independently and without consultation with any other bidder.

Collusion: A secret agreement or cooperation between two or more parties to accomplish a fraudulent, deceitful, or unlawful purpose.

Collusive Bidding: An unethical and illegal practice in which suppliers act in collusion to “fix” their bids in a collectively advantageous manner.

Competitive Bidding: The submission of prices by individuals or firms competing for a contract, privilege, or right to supply merchandise or services. Competitive sealed bidding is the preferred method of source selection in public purchasing.

Competitive Sealed Proposal: A method for acquiring goods, services and construction for public use in which discussions or negotiations may be conducted with responsible proposers who submit proposals and prices in the competition that meet the required criteria.

Conflict of Interest: Every person, business or entity involved in the procurement process must adhere to a high standard of ethics. Each will be bound by the City Code of Ethics and this Section. Whenever this Section conflicts with the City Code of Ethics, the City Code of Ethics shall control. For the purposes of this section, the term “City Employee” means any person employed by the City of College Park, and the term “City Official” means any elected or appointed official of the City or of an agency, authority or instrumentality of the City.

Consumer Price Index (CPI): The Consumer Price Index is a measure of the average change in prices over time in a fixed market basket of goods and services. Two CPIs are published: (1) the CPI for All Urban Consumers (CPI-U) which covers a percentage of the total populations, and (2) the CPI for Urban Wage Earners and Clerical Workers (CPI-W) which covers a percentage of the total population. The CPI is based upon prices of food, clothing, shelter, transportation, medical care, and

other goods and services that people buy for day-to-day living. See U.S. Bureau of Labor Statistics link [CPI Home : U.S. Bureau of Labor Statistics \(bls.gov\)](https://www.bls.gov) for latest percentages.

Contract Administration: The management of all facets of a contract to assure the contractor's total performance is in accordance with the contractual commitments and that the obligations of the contractor under the terms and conditions of the contract are fulfilled.

Contract Management: The management of the organization's contracts and contract-related activities which may include accounting, administration, auditing, grants management, law, negotiation, logistics, price-structure compensation, delegation of purchasing authority, program management, termination and other business activities.

Contractual Services: shall mean and include all telephone, gas, water, electric light and power service, towel and cleaning service, insurance, leases and concessions, demolition of buildings, rental, repair or maintenance of equipment, machinery and other like services. The term services shall not include professional services, which are unique in their nature and not subject to competition.

Cooperative Purchasing: An approach in which several organizations jointly buy selected items. They may form or utilize a centralized buying service that purchases specified types of items for all members of the group or cooperate informally. The resulting volume buying usually produces significant cost savings for group members. In simple terms, cooperative purchasing involves sharing procurement contracts between governments.

Cooling-off Period: A period of time that must pass before someone can do something or before an agreement becomes final.

Debarment: The exclusion, for cause, of a vendor or contractor from bidding and/or receiving a contract to do business with the City.

Emergency Purchase: A purchase made without following the normal purchasing procedures in order to obtain goods or services quickly to meet an urgent and unexpected requirement where health and public safety or the conservation of public resources is at risk.

Ethics: Pertaining to or relative to moral action, conduct, motive or character; as ethical emotion; professionally right or benefitting; conforming to professional standards of conduct.

Evaluation Criteria: Factors, usually weighted, relating to management capability, technical capability, and manner of meeting performance requirements, price and other important considerations used to evaluate which proposer in a competitive negotiation has made the most advantageous offer.

Fair Market Value: Lowest purchase price paid by the State for like items or services purchased in a similar quantity within the last six months. If this information is not available, then the lowest of three phone quotes verified by price indices or purchases made by other government entities will be used.

Grant: Financial assistance pursuant to written agreements/contracts to carry out a specific purpose.

Grantee: The recipient of a grant.

Grantor: The provider of a grant.

Identical Bid: A bid that is the same in all noticeable respects with another bid.

Information Bid: A competitive bid or price quotation for supplies or services that is conveyed by letter, telephone, or other means and does not require a sealed bid, public opening, or public reading of bids.

Invitations to Bids (ITB): Also called Invitation for Bids (IFB). A solicitation inviting potential contractors or vendors to submit sealed, written pricing for specific goods or services in conformance with specifications, terms, conditions and other requirements described in the bid invitation documents. Price is the major consideration in the award determination.

Invitation to Negotiate (ITN): A formal competitive solicitation for the purchase of goods and/or services, where factors other than price are to be considered in the award determination. Examples of procurement needs that may fall under this format include software purchases, acquiring consultants and design-build projects.

Non-responsive Bid: A bid that does not conform to the mandatory or essential requirements of the Invitation for Bid.

Notice of Award: A written notification from the City to the successful bidder, stating that there is an award of a contract in accordance with a bid or proposal previously submitted.

Payment Bond: A bond that assures payments, as required by law, to all persons supplying labor or material for the completion of work under the contract. Also known as labor and materials bond.

Performance Bond: A contract of guaranty executed subsequent to award by a successful bidder to protect the City from loss due to contractor's inability to complete the contract as agreed.

Piggyback Method: A form of intergovernmental cooperative purchasing in which an entity requests competitive sealed bids, enters into a contract, and arranges, as part of the contract, for other public purchasing units to purchase from the selected vendor under the same terms and conditions as itself.

Piggyback Contracts: Contracts issued by individual governmental entities that allow other jurisdictions to use the contract (i.e., to "piggyback" on the contract terms and prices) they established. The contracting jurisdiction must include piggyback language in the contract and the vendor must agree.

Pre-bid/Pre-proposal Conference: Meeting held with prospective bidders or proposers prior to submission of bids or proposals, to review, discuss, and clarify technical considerations, specifications, and standards relative to the proposed procurement.

Pre-Qualification of Bidders: The screening of potential vendors in which such factors as financial capability, reputation, and management are considered in order to develop a list of qualified vendors.

Pre-Solicitation Conference: An information meeting inviting comments and suggestions from selected vendors on the draft of a proposed solicitation. Used for technical and complex service(s) transactions when composing solicitation document(s).

Price Agreement: A price agreement is the acceptance of a supplier's promise to furnish items or services to the City at a firm or fixed unit price, or at a firm or fixed percent discount against an escalating market, for a specific period of time.

Protest: A written complaint about an administrative action or decision brought by a bidder or proposer to the appropriate administrative section with the intention of receiving a remedial result.

Public Notice: The display of procurement notices in an area regularly used for that purpose that is available to the public during normal working hours or by posting on the City's internet web page.

Purchasing Department: Reports directly to the Director of Accounting and Finance

Purchasing Ethics: Moral principles or code to be respected by the Purchasing Department or any division or department having responsibility in the procurement process

Purchasing Manual: A document that describes the rules and procedures to be followed by the City

Purchasing Policy: A course of action adopted in purchasing affairs

Purchasing Procedure: A mode of conducting purchasing activities

Quotation: Any oral or written informal offer by a vendor to the City to furnish specific goods and/or services at a stated price.

Request for Information (RFI): A solicitation for response from interested and prospective vendors/contractors to provide information to determine specifications, qualifications and/or capabilities to satisfy a need rather than a firm specification, and in which the respondent may be given latitude in order to develop a product and/or service which will fulfill the need. Upon receipt of responses to the RFI, the City may develop specifications for an Invitation for Bids or criteria for a Request for Proposal, either of which may be issued to qualified proposers who submitted responses to the RFI.

Request for Proposal (RFP): A solicitation document used when price is not the determining criteria and it is used in the competitive negotiated process. The procedure allows changes to be made after proposals are opened and contemplates that the nature of the proposals and/or prices offered will be negotiated prior to award. The request for proposals is used when it is not practicable for the City to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required and when the City is requesting that a responsible vendor propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document. Evaluation of a proposal is based on prior established criteria wherein the RFP shall state the relative importance of price and other evaluation factors. Examples of procurement needs that may fall under this format include software purchases, acquiring consultants and catering services. RFP is used to procure the most cost-effective solution based upon evaluation criteria identified in the RFP.

Request for Quotation (RFQ) - A solicitation seeking responses for services for which the competitive award will be based on the qualifications of those responding; generally, but not limited to, used in procuring certain professional services, design build services, consulting and construction management services.

Responsible Bidder, Proposer, or Respondent: A person who has the capability in all respects to

perform fully the contract requirements, and the tenacity, perseverance, experience, integrity, ability, reliability, capacity, facilities, equipment, financial resources and credit which will assure good faith performance.

Responsive: A proposer’s full and proper responsiveness to a solicitation. This means that the proposer “responded” to the solicitation exactly the way he or she was instructed. It means that everything to be completed was, in fact completed and in proper order and format as directed by the solicitation.

Salvage: Property that has some value in addition to its value as scrap, but which is no longer useful as intended in its present condition and whose restoration to usefulness as a unit is economically not feasible.

Sealed Bid/Proposal: A bid or proposal that has been submitted in a sealed envelope to prevent its contents being revealed or known before the deadline for the submission of all bids or proposals.

Selection Committee: A committee formed to evaluate proposals based on certain criteria as stated in the RFP or RFQ.

Single Source: The one source among others that, for justifiable reason, is found to be the only acceptable one for the purpose of the procurement.

Shortlisting: The part of a competitive procurement process in which the City determines, based on criteria developed for a specified good, service, or professional service which of the interested vendors are best qualified to be eligible for further consideration in the purchasing process.

Sole Source: The only existing source of an item, which meets the needs of the user department as determined by a reasonably thorough analysis of the marketplace.

Sole Source Procurement: An award for a commodity or service to the only known capable supplier, occasioned by the unique nature of the requirement, the supplier, or market conditions.

Solicitation: A request for bids to provide supplies, services or construction items.

Specification: A concise statement of a set of requirements to be satisfied by a product, material, service, or process used in an Invitation for Bids or Request for Quotation to describe the goods and service to be purchased or otherwise required. Any description of the physical or functional characteristics, or of the nature of a supply, service, or construction item. It may include a description of any requirement for inspecting, testing, or preparing a supply, service, or construction item for delivery.

Specifications Committee: A committee that works together to establish specifications. Often such a committee includes representatives with expertise from using agencies and specializes in a particular product area. A committee may also contribute advice and assistance in the development of standards.

Sunshine Law: Georgia’s Sunshine law (O.C.G.A § 50-14-5 and § 50-18-73) requiring meetings to be open to the public. This law governs committees involved in the selection and negotiation of vendors.

Surety Bonds: A document from the contractor that is issued to guarantee that an obligation will

be fulfilled.

Surplus Property: Inventory not needed by the owning agency or by other agencies at the present time or in the foreseeable future.

Tabulation of Bids: A recording of bidders and abstract of their bids listing items offered, prices, deliveries, etc. in response to a specific solicitation, made for purposes of comparison and record-keeping.

Terms and Conditions: A general reference applied to the provisions under which bids must be submitted and which are applicable to most purchase contracts.

Using Agent: Any department, division, agency, commission, board, committee, authority, or other unit in the City Government using supplies or procuring contractual services as provided for in this policy.

Waiver of Bid(s): A process authorized by law or rule whereby a government purchasing office may procure items without competitive bidding procedures because of unique circumstances related to a particular need or procurement.

Waiver of Mistake or Informality: The act of disregarding errors or technical nonconformities in bids, which do not change the substance of the bid and will not adversely affect the competition between bidders.

SECTION I

RESPONSIBILITIES AND FUNCTIONS OF PURCHASING DEPARTMENT

- A. Developing purchasing objectives, policies, programs and procedures for the purchasing of, and contracting for all materials, supplies, equipment, services, and construction.
- B. Responsible for administering the Purchasing Policies and Procedures Manual, as approved by the City Mayor and Council regarding all matters pertaining to purchasing.
- C. Revising solicitations provided by user department/division by assembling specifications, quantities and technical requirements, presented to the Purchasing Department, which are subsequently included in Invitations for Bid, Requests for Proposals/Qualifications, and/or Requests for Quotations.
- D. Promoting goodwill between the City of College Park and its suppliers. Encouraging full and open competition whenever possible. In addition, assuring fair and equitable business dealings with all vendors.
- E. Train and guide City's personnel in regards to purchasing procedures, as needed.
- F. Exploit the possibilities of buying "in bulk" to take full advantage of discount. Act to procure for the City the highest quality in supplies and contractual services at the least expense to the City.
- G. Discourage unfair bidding and attempt to obtain as full and open competition as possible on all purchases and sales.
- H. Establish and amend, when necessary, all rules and regulations authorized by this policy.
- I. Prescribe and maintain a standard purchasing manual for using departments. Prescribe and maintain such forms as shall be reasonably necessary to operation of this policy.
- J. Prepare and adopt a standard purchasing terminology for using departments and suppliers.
- K. Act on behalf of the City to procure all tax exemptions to which it is entitled.
- L. Cooperate with using departments to secure for the City the maximum efficiency in budgeting and accounting.
- M. Ensure that proprietary material provided is kept confidential before and after the award, if necessary.

SECTION II

RESPONSIBILITIES OF REQUESTING DEPARTMENTS/DIVISION

- A. Identifying, as soon as possible, and sufficiently in advance, their needs for goods and services in their City operations and activities.
- B. Enter requisitions as outlined in this manual allowing sufficient lead-time for Purchasing to complete purchase orders then return the completed purchase order to the requesting department, in order to submit the order to the vendor to deliver goods or services.
- C. Follow the City's purchasing policies outlined in the Purchasing Policies.
- D. Determine that sufficient funds are available in their authorized budgets to pay for each item or service that they order.
- E. Prepare scope of service(s) and technical specifications, when needed, for products or services.
- F. Inspect all items or services as delivered and notifying Finance (Accounts Payable) of the receipt in order to authorize payment to the vendor.
- G. Submit bid and proposals to Purchasing for review and assembly before advertising.
- H. Send all documentation required and request for purchase to "piggyback" using State of Georgia contracts, Sourcewell, OMNIA Partners, NCPA (National Cooperative Purchasing Alliance), other competitive bids, or a Sole Source request.
- I. Send all documentation required and requests for grant related procurement.

SECTION III

GENERAL PROCEDURES FOR PURCHASE OF GOODS AND SERVICES

The following procedures shall govern the purchasing of goods and services for the City in accordance with these policies and procedures manual:

- A. **Competitive Threshold:** When the total annual anticipated value of goods and/or services exceeds \$10,000.00, the goods and/or services must be competitively procured in accordance with Purchasing Policies and Procedure Manual and a Term Contract should be issued, when applicable.
- B. **Exceptions Prohibited:** Unless otherwise provided herein, there shall be no exceptions by any using department/division to the above provisions; *except* as may be specifically authorized by the City Manager in a written statement stating the reason for said exception(s).

Some common exceptions below. The provisions of this policy do not apply to procurements for the following:

- i. Public works construction contracts to the extent governed by O.C.G.A. §36-91-1 *et seq.*;
- ii. Services and construction whose procurement falls under a conflicting federal or Georgia statute;
- iii. Works of art for public places, or other creative/artistic endeavors that require a particular and demonstrated skill or talent to include, but not limited to, artists, musicians, and writers;
- iv. Antiques and other unique assets of historical value, including restoration of these items;
- v. Real Property, including but not limited to transactions governed by O.C.G.A. § 36-37-1 *et seq.*, real estate brokerage and appraising, abstract of titles for real property, title insurance for real property, and other related costs of disposition and/or acquisition of real property, except as provided in Section VII(F)(Real Estate Acquisitions);
- vi. Employee Benefits and health related services procured through a quotation and negotiating process conducted by an expert in the field, or to maintain continuity of employee-health records;
- vii. Dues, memberships, and board member fees;
- viii. Insurance procured through a negotiating process;
- ix. Legal services, litigation, experts and materials, and related legal expenses;
- x. Financial Instruments: Professional services and instruments/products related to the City's financial well-being, including but not limited to the following areas: marketing of bonds and other forms of debt or debt management, investments, banking, assets, and pension assets;

- xi. Subscriptions and dues established during the budget process;
 - xii. Utilities;
 - xiii. Seized Property included in a court order authorizing disposal;
 - xiv. Grant awards or agreements that require certain firms or individuals to perform the work;
 - xv. Contracts involving federal funding whose procurement falls under a conflicting federal or Georgia statute or regulation
- C. **Emergency:** This section shall not apply to any emergency purchase, which is subsequently approved by the Director of Finance and Accounting upon justification by the using agents. (See Section VI – Emergency Purchases)
- D. **Inspection and Testing:** The user department(s) shall inspect all deliveries of supplies or contractual services to determine their conformance with the specifications set forth in the order or contract.
- E. **Prohibition against Subdivision:** No contract, purchase or group of requisitions shall be divided to avoid the procurement process. Splitting procurements, which entails making purchases via various procurement methods to avoid established thresholds from the same department/division for the same vendor or multiple vendors for goods or services of similar nature over a period of one (1) year is not allowed.
- F. **Open Market Purchases:** When the total annual anticipated value of the goods and/or services is below \$10,000.00, the goods and/or services may be procured on the open market.
- i. **Minimum Number of Bids/Quotes:** All open market purchases or sales shall, whenever possible, be based on at least three (3) competitive informal bids/quotes and shall be awarded to the most responsible bidder in accordance with the standards set forth in this policy. This does not apply to maintenance or reoccurring charges such as utilities, insurance and advertising.
 - ii. **Invitation of Bids:** The City Manager may solicit either oral or written bids for open market pricing or sale, but shall use all reasonably available and current bidders and suppliers' lists.
- G. **Purchase or Contract:** To perform the duties herein specified in connection with the purchase or contract for all supplies and contractual services needed by any using agent which derives its support wholly or in part from the City, when duly authorized, in accordance with purchasing procedures as prescribed by this policy and such rules and regulations as may be adopted for the internal management and operation of the Purchasing Department and such other rules and regulations as shall be prescribed by the City Mayor and Council.
- H. **Unauthorized Purchases:** It shall be unlawful and unauthorized for any employee, elected or appointed official or other person to order the purchase of any materials, supplies, equipment, and/or contractual services or make any contract within the purview of this policy other than through the Purchasing Department. The City shall not be bound by any purchase order or contract made contrary to the provisions herein.

Reference Guide and Requirement Limits

	Procurement Method*	Required Approvals**
≤ \$500.00	No requisition/purchase order necessary; <i>unless</i> vendor request.	1. Department Director
\$500.01 - \$10,000.00	<i>Open Market Purchase:</i> Three informal quotes, if possible. Requisition, purchase order, and/or contract as appropriate.	1. Department Director 2. Purchasing Department (Agent) 3. Finance Department 4. City Manager 5. City Attorney (contracts)
> \$10,000.00	<i>Competitive Procurement:</i> Formal solicitation required. Requisition, Purchase Order, and/or Contract as appropriate.	1. Department Director 2. Purchasing Department (Agent) 3. Finance Department 4. City Manager 5. City Council 6. City Attorney (contracts)

* The procurement methods listed above are not applicable to sole/single source procurements, emergency procurements, and cooperative purchasing. Notwithstanding this exclusion, the required approvals must still be obtained based on the applicable purchasing threshold unless otherwise provided herein.

** City Council approval always required if purchase is not within annual budget.

SECTION IV


SMALL PURCHASE and PURCHASE ORDER FORMALIZATION

Requisition: The requisition is initiated by the user department/division to inform the Purchasing and Finance Department of the requirement and to define the goods or services requested. A requisition is required to start the procurement process for all purchase orders. The requisition consists of completed required data fields and all attachments needed for the type of requisition. The New World ERP system will check the budget and verify that there are sufficient funds available in the account number(s) specified.

Requisitions are initiated in the City's Financial System (New World ERP). Only authorized persons are allowed to initiate requisitions. Requisitions should be prepared far enough in advance to avoid creating an emergency and to allow competitive pricing. Prices must be found fair and reasonable. This is normally done through competition; but where competition is unavailable, previous buys, catalog prices, cost analysis or other means should be used.

All capital items in the approved budget should be requisitioned early in the fiscal year, with a specified delivery date, preferably before June 30th of the current fiscal year. If the supplier is not able to meet the deadline, the supplier should provide an estimated delivery date and notify the Purchasing Department to keep the assigned purchase order open. This allows the funds earmarked for the order to be available, from that (approved) fiscal year for payment processing.

Entering Requisition(s): All itemized requisitions should contain all necessary information.

- A. Department
- B. Vendor
- C. Description of item(s) for each line
- D. Category – Standard/Blanket
- E. Form Type – Standard
- F. Item
- G. Quantity
- H. Price per Unit
- I. G/L Account
 - a. You can split accounts within the same department, if needed
 - b. Click (Multiple G/L Account Distribution) button next to eye

- J. Ship To location

Requisition Routing: A standard purchase order requisition form, once released, will be routed electronically to the appropriate approver. Once all approvals have been obtained, the Purchasing Department verifies that the charge codes are accurate and will create a purchase order for the requisition. A copy of the purchase order will be emailed to the individual who created the requisition. In the event that the charge code is incorrect, after the creation of the purchase order, the requestor will need to notify the Purchasing Department to cancel the purchaser order to release the funds back to the G/L account. At which time a new requisition will need to be entered and following the routing rules.

The originating department will forward a copy to the vendor, which authorizes the vendor to supply

the materials, and/or services and invoice to the City in accordance with the terms and conditions as stated on the purchase order.

Requests for Blanket Order: Purchases shall be created the same as a standard purchase order requisition with the using division indicating thereon whether the purchase involves a price agreement or not.

After the blanket order is issued, the department/division shall draw on the order and keep a record of cost of the item delivered until the blanket purchase order is completed.

The Finance Department will then process for payment the invoice(s) received for the deliveries so that any discounts may be obtained. The final payment on blanket purchase order will be made by the Finance Department on receipt of receiving final invoices.

Change Orders: In the course of purchase order administration, it often becomes necessary to make changes to the contract terms. This is accomplished by means of the Purchase Order Change form (see Appendix A). Change Orders are then prepared by the requesting department and approved by the Purchasing/Finance office based on information supplied by the originating department by means of the Change Form. Some rules regarding the use of Purchase Order Change Form are as follows:

- A. All purchase order change requests shall be routed through the Finance office to ensure that adequate funds are available.
- B. Purchase Order Change Orders not exceeding \$999.99 shall be approved by the Finance Director.
- C. Change Orders increasing the cost from \$1,000.00 to \$10,000.00 must have City Manager approval, and \$10,000.00 and over must have City Council approval.
- D. A change order will not be issued unless a Purchase Order Change Form is received from the department concerned.
- E. Once multiple changes for a single purchase order have reached the maximum threshold of \$25,000.00, an Agenda Item Summary will need to be prepared by the requesting department for approval by the City Council. These changes will be regulated and maintained by the Finance Department.

Requisition for Vehicles: All purchase order requisitions for vehicles will be issued by the requesting department/division. All departments should request pricing for an approved dealership under State of Georgia contract. Department Directors shall place the request on the upcoming agenda, in order for consideration of the purchase. If approved, the requisition entry process should be followed and attaching any/all documents (i.e., pricing sheet, approved agenda item).

SECTION V

EMERGENCY PURCHASES

An emergency exists when a situation, malfunction, or condition occurs suddenly and unexpected that (1) may threaten the health, safety, property, or welfare of the public; (2) stops or seriously impairs the function of City government, such as inclement weather, epidemics, riots, equipment failures, etc.; or (3) requires immediate procurement of goods and/or services that are essential to comply with state or federal regulatory requirements. Failure to anticipate normal needs project deadline dates or a desire to expend excess or remaining budgeted funds prior to year-end, does not constitute an emergency. Department Directors are to ensure the emergency purchases are done in accordance with this manual. Department/Division shall not use the emergency purchase procedure to abuse or otherwise purposely circumvent established purchasing procedures. The Purchasing Department is authorized to approve emergency purchases up to expressly delegated monetary amounts. The City Manager may approve those exceeding \$10,000.00 and return to the Mayor and Council for ratification of the emergency purchase on the next following Mayor and Council meeting, unless an executive order has been issued that suspends all requirements during disaster related events.

If during a normal business day, a department/division Director determines that an emergency exists and a purchase is required, the Director shall telephone Purchasing/Finance Department to request an emergency purchase order. A complete description of the emergency and justification for the purchase is required. The emergency must be valid and not just a result of poor planning. When requesting an Emergency Purchase, consider the following:

- A. The reason for the emergency purchase by explaining what the emergency is in addition to what led to the emergency.
- B. The financial or operational damage or risk that will occur if needs are not satisfied immediately.
- C. Why the needs were not or could not be anticipated so that products or services could have been purchased following standard procedures.
- D. The reason and process used for selecting the vendor.

The requesting department/division is responsible for providing adequate documentation (including a written determination of the basis for the emergency) and for the selection of the particular Contractor. Upon receipt of the Emergency Purchase Explanation Memo (See Appendix B) and any other pertinent documentation, a purchase order will be issued based on a requisition generated. Competition requirements are not waived unless there is a time or quality constraint. If the emergency is outside normal business hours, department Directors are authorized to secure the necessary materials or services in accordance with this policies and procurement manual. On the next workday following the date of purchase, a requisition shall be generated in the New World ERP system. In addition, the Emergency Purchase Explanation Memo shall be submitted to Purchasing/Finance.

The department/division shall practice due diligence in obtaining quotes and make the emergency purchase at the best possible price. When an emergency purchase is made and there are insufficient funds in the appropriate account(s), the emergency purchase must be followed up, in a timely manner, with a budget transfer by the user department/division director.

If the emergency is anticipated to cost less than \$10,000.00, and Purchasing/Finance determines the emergency is valid, notification stating authorization to proceed will be issued to the requesting department Director.

If the emergency is anticipated to exceed \$10,000.00, Purchasing/Finance shall review the documentation and obtain approval from the City Manager. All emergency requests must be accompanied by a written description and explanation of the emergency and circumstances.

Emergency Purchasing Procedures:

A. During Normal Workday

- i. Determine emergency situation
- ii. Determine required solution
- iii. Call Purchasing/Finance
- iv. Explain the Situation
- v. Get authorization
- vi. Solve problem
- vii. Submit complete written report and requisition same or next business day.

B. Outside Normal Workday

- i. Determine emergency situation
- ii. Determine required solution
- iii. Solve problem
- iv. Submit complete written report and requisition next business day. If over \$10,000.00 prepare “Agenda Item” for next scheduled City Mayor and Council.

SECTION VI

SOLE/PROPRIETARY/SINGLE SOURCE

The term “**sole source**” means that the commodity can be legally purchased from only one source. This is usually due to the source owning patents and/or copyrights. A requirement for a particular proprietary item does not justify a sole source purchase if there is more than one potential supplier for that item. Use of Brand Names and Model numbers does not constitute a sole source.

The term “**single source**” means that a commodity can be purchased from multiple sources, but in order to meet certain functional or performance requirements (repair parts, matching existing equipment or materials) there is only one economically feasible source for the purchase.

Purchases of goods and/or services from a sole/single source may be exempted from the quoting or bidding requirements upon written submittal to Purchasing/Finance Director stating the purpose, need, and justification that this product or service is the only one that will produce the desired results. A letter or statement from a dealer, distributor or manufacturer is sufficient.

The following criteria must be met in order to satisfy the sole/proprietary/single source requirement.

- A. Is the commodity or services necessary to accomplish the City’s task or mission?
- B. Is the commodity or service, or some necessary features, unique to this source?
- C. Is the commodity or service the only item that will produce the desired results or possess a unique performance capability?
- D. Is the commodity or service available from only one source of supply?
- E. Even though the commodity or service may be available from more than one vendor, due to extreme circumstance(s), is only one vendor suited to provide the goods or services.

Sole/Proprietary/Single Source purchases are exempt from competitive requirements. However, all sole source requisitions exceeding \$10,000.00 in value will be electronically advertised for a minimum period of at least seven (7) calendar days. The steps to follow for sole/proprietary/single source purchases are as follows:

- A. The department/division shall attempt to locate competition and check for piggyback contracts. If no other sources are found, the department/division shall submit to the Purchasing Department a completed Sole/Proprietary/Single Source Form (see Appendix D), indicating the requisition number.
- B. A Sole/Proprietary/Single Source Form shall be used to justify and document the requirement. The Form shall state why only one source can produce the desired results (or fulfill the specific need) and must be signed by the Department Director. This form is required as part of the purchase request.
- C. The Purchasing/Finance Director or designee shall review and approve or disapprove, in writing; sole/proprietary/single source designation. When the Finance Director approves a sole or proprietary source, staff shall conduct negotiations on price, delivery, and terms. The price must be determined fair and reasonable.

- D. The Purchasing Division shall keep a log of sole/proprietary source purchases, which includes the vendor's name, the amount, item description, justification, and the purchase order number.
- E. For those instances that services are needed involving multiple years (i.e. maintenance of equipment, warranty, etc.) the request must be combined to capture the project, as a whole, and the proper approval must be obtained.

SECTION VII
FORMAL CONTRACT PROCEDURE

Except as otherwise provided herein, when the estimated cost of goods and/or services exceeds ten thousand (\$10,000.00), the goods and/or services must be competitively procured and shall be purchased by formal, written contract from the most responsible bidder/proposer. Notwithstanding a purchase order may be executed in lieu of a formal contract for the procurement of goods. All sales of personal property (except trade-in personal property) which has become obsolete and unusable, when the estimated value shall exceed five thousand dollars (\$5,000), shall be accomplished by formal contract to the highest responsible bidder, after due notice inviting proposals has been published as required by law.

While the City of College Park only considers one-year contracts for service(s), the City reserves the right to auto renew contracts, when it is in the best interest of the City.

Signature authorities:

- A. Department head or City Manager may execute all contracts for goods and services valued at \$500 and below;
- B. City Manager or designee up to and include \$10,000.00;
- C. Mayor or Mayor's designee over \$10,000.00

Refer to reference guide and requirement limits:

Procurement Method*		Required Approvals**
≤ \$500.00	No requisition/purchase order necessary; <i>unless</i> vendor request.	1. Department Director
\$500.01 - \$10,000.00	<i>Open Market Purchase:</i> Three informal quotes, if possible. Requisition, Purchase Order, and/or Contract as appropriate.	1. Department Director 2. Purchasing Department (Agent) 3. Finance Department 4. City Manager 5. City Attorney (contracts)
> \$10,000.00	<i>Competitive Procurement:</i> Formal solicitation required. Requisition, Purchase Order, and/or Contract as appropriate.	1. Department Director 2. Purchasing Department (Agent) 3. Finance Department 4. City Manager 5. City Council 6. City Attorney (contracts)

* The procurement methods listed above are not applicable to sole/single source procurements, emergency procurements, and cooperative purchasing. Notwithstanding this exclusion, the required approvals must still be obtained based on the applicable purchasing threshold unless otherwise provided herein.

** City Council approval always required if purchase is not within annual budget.

SECTION VIII

STANDARDIZATION AND SPECIFICATIONS

The Purchasing Department encourages all departments to establish standards whenever possible.

Specifications is defined as “a concise statement of a set of requirements to be satisfied by a product, material, or a process indicating, whenever appropriate; the procedure by which it may be determined whether the requirements given are satisfied.”

Specifications need to be a clear and complete description of requirements or products necessary to meet the purchase. A vendor must meet or exceed specification requirements if his/her goods or services are to be considered for purchase.

Specifications shall be clear, concise, and accurate. These should be updated regularly to reflect changes in technology. Avoid the use of unfair specification, which preclude or reduce competition.

Specifications may be in the form of written descriptions, drawings, commercial designations, industry standards or brand name or equal. These specifications are an integral part of the solicitation.

Specifications should NOT require materials of a better quality than are actually needed. Yet, they should prescribe the methods of inspection and testing which will govern the acceptance or rejection of any ordered materials or equipment.

Well-defined specifications are required if the objectives of economy and efficiency are to be achieved. They help to ensure that maximum value is obtained for the public funds expended.

Professional architects, engineers and consultants shall prepare specifications for construction projects. In the event such consultant services are required, the consultant shall execute a Certification of Absence of Conflict of Interest as provided in the Appendices attached hereto prior to performing any consulting work on behalf of the City.

Using departments may consult with vendors for technical assistance. This method should be viewed with some reservation because competition can be precluded or quality diminished. Proposals of competing firms must be compared. BEWARE of restricting your specification that only one vendor can supply the item.

SECTION IX

FORMAL SOLICITATIONS

Fair and open competition is a basic tenet of public procurement. Such competition reduces the opportunity for favoritism and inspires public confidence that contracts are awarded equitably and economically.

If the estimated value is greater than \$10,000.00, the using Department/Division must prepare a formal, sealed solicitation Invitation to Bid (ITB), Request for Proposals (RFP), Request for Qualifications (RFQ), or Request for Information (RFI) & Invitation to Negotiate (ITN), which will be publicly noticed and advertised. This process requires time, please plan ahead. (Please reference to the Advertising Requirements Matrix)

Purchasing should not be placed in the position of deciding upon and specifying bid items for individual department usage. Purchasing will assist in writing general specifications, terms and conditions; however, they must be reviewed and final accepted by the using department before advertising. All requests shall be provided to the Purchasing Division for verification and approval before officially advertising the request.

Purchasing will review the specification and/or statement of work to ensure that they are adequate for the solicitation document or will work with the requesting department to identify additional specification and/or scope of work, terms and conditions.

Invitation to Bids (ITB): The invitation to bid shall be used when the department/division is capable of specifically defining the scope of work for which a contractual service is required or when the department/division is capable of establishing precise specifications defining the actual commodity or group of commodities required. Examples: construction jobs, equipment, vehicles, etc.

This procedure is a formal sealed bid process. Departments requiring this procedure shall submit to the Purchasing Department, specifications in an electronic file detailing the goods or services required plus suggested dates for bid opening, pre-bid conference, contracts, and bonds if appropriate and applicable.

After bid opening has been completed, the department head shall review all bids for compliance with the specifications and select a vendor for recommendation. Vendor selection will be based on the lowest, compliant, qualified bid unless specified otherwise in the Invitation to Bid.

All invitations to bid must include:

- A. Detailed description of the commodities or contractual services required;
- B. If the department/division contemplates renewal of the contract, a statement to that effect;
- C. Bids/proposals submitted in response to an invitation to bid in which the agency contemplates renewal of the contract must include the price for each year for which the contract may be renewed;
- D. Designate date, time and location for bid opening;

E. General Terms and Conditions;

F. Required Standard Forms:

G. Evaluation Criteria of bids/proposals shall include consideration of the total cost for each year of the contract, including renewal years, as submitted by the vendor.

For an ITB, the department/division shall transmit in writing its recommendation for award to the Purchasing Department. For solicitation types other than ITB, an evaluation committee will be selected and meeting(s) will be scheduled to rank or determine a recommendation to City Mayor and City Council. For solicitations that are very technical in nature, a technical evaluation and selection committee may be required to evaluate the firms on a pass/fail type basis related to the technical specifications and/or statement of work.

Request for Proposal (RFP): A department/division shall use a request for proposals when the purposes and uses for which the commodity, group of commodities, or contractual service being required can be specifically defined and the department/division is capable of identifying necessary deliverables. Examples are legal services, accounting services, architecture, engineering, auditing services, etc.

This process involves the evaluation and selection of a consultant based upon various factors including, but not limited to the consultant's expertise, experience, social equity contracting/corporate responsibility, licenses or certifications, work history, understanding of the scope of work and ability to resolve the issue or problem identified within the RFP document while providing a quantified cost for completing the work. Therefore, the RFP must provide sufficient information about the project's background, needs and constraints, expectations of the consultant and the desired outcome for prospective proposers to prepare complete proposals that satisfy the project's needs.

All requests for proposals must include:

- A. A statement describing the commodities or contractual services to be required (Scope of Services/Work);
- B. If the City contemplates renewal of the contract, a statement to that effect;
- C. Criteria that will be used for evaluation of proposals;
- D. General terms and conditions;
- E. Required Standard Forms
 - 1. Certification (see Appendix)
 - 2. Vendor Questionnaire (see Appendix)
 - 3. Non-Collusion Affidavit (see Appendix)
 - 4. Sworn Statement (see Appendix)
 - 5. Drug Free Workplace Certificate, etc. (see Appendix)

The contract shall be awarded by written notice to the responsible and responsive proposer whose proposal is determined in writing to be the most advantageous to the City, taking into consideration the price and other criteria set forth in the request for proposals. The contract file shall contain documentation supporting the basis on which the award is made.

Invitation to Negotiate (ITN): The invitation to negotiate is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive

vendors with which the City may negotiate in order to receive the bestvalue.

- A. The invitation to negotiate must describe the questions being explored, the facts being sought, and the specific goals or problems that are the subject of the solicitation.
- B. The criteria that will be used for determining the acceptability of the reply and guiding the selection of the vendors with which the agency will negotiate must be specified.
- C. The City shall evaluate replies against all evaluation criteria set forth in the invitation to negotiate in order to establish a competitive range of replies reasonably susceptible of award. The City may select one or more vendors within the competitive range with which to commence negotiations. After negotiations are conducted, the City shall award the contract to the responsible and responsive vendor that the City determines will provide the best value, based on the selection criteria.
- D. The contract file for a vendor selected through an invitation to negotiate must contain a short plain statement that explains the basis for the selection of the vendor and that sets forth the vendor's deliverables and price, pursuant to the contract, along with an explanation of how these deliverables and price provide the best value to the City.

Public Notice Advertisement: The following are guidelines as to where and how postings will apply:

- A. All competitive solicitations of \geq \$10,000.00 shall be posted on the GPR and a minimum of two (2) of the following locations:
 - 1. The College Park website
 - 2. City's legal organ (South Fulton Neighbor)
 - 3. Posted in the foyer of the City Hall Complex
 - 4. DOAS GPR (Georgia Procurement Registry)
 - i. All bids/proposals \geq \$100,000.00 must be posted on the GPR (OCGA 36-80-27)
 - 5. Vendor Registry.com
 - 6. National Association of Minority Contractors - Georgia Chapter
- B. The following advertising guidelines will be followed by the Purchasing Department when posting competitive solicitations:
 - 1. \$10,000.00 - \$99,999.99 = Minimum Two (2) Weeks.
 - 2. \$100,000.00 and above = Minimum Four (4) Weeks
 - i. All public works contracts \geq \$100,000.00 must be posted on GPR for a minimum of four (4) weeks prior to bid opening (OCGA 36-91-20)

With the exception of construction bids, the City Manager, may approve the posting of a competitive solicitation for a period of time less than the guidelines stated above when sufficient evidence justifying the reduced posting time period has been established.

Bid Sureties: When deemed necessary by the City Manager, or as required by state or federal law,

bid deposits shall be prescribed in the public notices inviting bids. Unsuccessful bidders shall be entitled to return of surety where the City Manager has required such. (See Bonds Section XIII)

Bid Conditions: In addition to the general conditions, most bids require special conditions, which pertain specifically to the bid in question. Conditions differ from specifications in that conditions refer to requirements, which must be met by the bidder or proposer before specifications of the item(s) bid are even considered.

For example, a supplier of furniture who cannot meet the required condition of a 30-day delivery will be eliminated even though his furniture may meet all physical specifications.

Conditions allow the City a high level of protection by the inclusion of various clauses relative to renewal of contract, cancellation, settlement of disputes, payment terms, delivery schedule, etc. By referencing the bid in a purchase order, the vendor is effectively bound by the terms, conditions, and specifications of that document. Therefore, should disputes arise; the written contract (bid or purchase order) will prevail.

Bid Specifications: The requesting department should provide Specifications for all bids. As a prime user, the department is best aware of any special characteristics or problems. Because they probably utilize the item daily to be proposed on, the department is best aware of any new developments in that product field. Specifications are the basis for a proposer's proposal. Realizing that bids will be compared primarily based on price, a vendor will seek to offer an item that only meets the specifications. Consequently, it is vital that specifications make no assumptions, but rather detail every important facet of the item in question. In doing this, it avoids delivery of items, which meet specifications, but fail to meet the department's expectations.

Specifications may be by performance description, or brand name; or a combination of the above. In some cases, description by noting the brand name of an acceptable unit may be the preferred method. However, to assure competition when using brand names, the phrase "or equal" should always follow the brand description. This allows vendors of similar products to bid thus promoting maximum competition and the best price for the City. Should proof of equivalency arise, the burden is on the substituting vendor to provide it. Final judgment of equivalency shall reside with the using Department's Head.

Sealed Bids/Proposals: Bids/Proposals shall be submitted sealed to the Purchasing Department and shall be noticeably identified using a supplied bid/proposal label to affix to the submission.

Sealed bids will be received only in the Purchasing Department (unless otherwise stated in the bid documents) on or before the assigned date and closing time as advertised. Bids received in any other department, will not be accepted.

NO electronic bid/proposals will be accepted.

- A. The requesting department shall have a representative present at each bid opening.
- B. Proposals are to be opened and read aloud to any party present at the bid opening.
 - a. Virtual bid openings can be used, if circumstances warrant.
- C. Proposals shall be made available for vendor review after the official opening is completed and under the supervision of the Purchasing Department or otherwise designated City staff.
- D. Bid tabulations may be available for bidders during and within ten (10) days after the bid opening.
- E. The requesting department shall retain a copy of the bids for their review and/or recommendation. The Purchasing Department will assist the department in making a recommendation, when necessary.
- F. Once a recommendation has been made of the successful bidder, the department head shall make a recommendation to the Purchasing Department in order to submit an "Agenda Memorandum" on MinuteTraq approving or disapproving this agenda item placed on the upcoming Mayor/Council Agenda.

Formal Opening: All formal solicitations shall be (publicly) opened at the time and place designated in the public notices in the presence of one (1) member of the Purchasing Division and shall be witnessed by at least one (1) department representative.

Tabulation: A tabulation of all bids received shall be created, provided by the Purchasing Department and available for public inspection, upon request.

Exception for Single Source Commodities: The City Manager stating the conditions and circumstances requiring the purchase may accept Purchases of supplies, equipment and contractual services from a single source from bid requirements upon certification. This certification shall set forth the purpose and need and why the item is the only one that will produce the desired results. (See Single Source Section)

Pre-Solicitation, Pre-Bid, Pre-Proposal Conferences: Conferences may be scheduled and conducted by Purchasing or designee, before the official time and date set for the formal opening to explain the purchasing requirements and to solicit information from potential bidders/proposers.

Mandatory: The meeting is required that all bidders have a representative attend if they plan to submit a proposal. If a mandatory meeting is conducted, only those firms who attend will be allowed to submit a proposal to the solicitation document. Therefore, at the mandatory meeting, all prospective proposers will sign in and only those identified from the sign-in sheet will be considered for the project and be eligible to have their proposals accepted. A representative from the requesting department and other technical experts will answer the questions posed during the meeting.

Any information provided at the meeting that will change the requirements of the solicitation document must be issued in the form of an addendum to all eligible proposers. Additionally, it is

required that substantive questions and resulting responses from the meeting be documented and provided to all eligible proposers in the form of an addendum. It is important to specify in the addendum which items are changes or modifications to the original solicitation document.

Note: Proposals from anyone not attending the mandatory conference(s) will not be considered.

Meeting Procedures: At the pre-proposal meeting, the facilitator will remind the potential proposers what meeting they are attending, introduce him/her, then introductions will include City's staff and any other project representatives in attendance. Introductions of proposers are not necessary, during the introduction phase of the meeting.

The facilitator will either discuss or have the appropriate staff address the following information:

- A. Pre-bid meeting sign-in requirement
- B. An explanation of the process
- C. Identify the submittal due date and advise that late proposals will not be accepted
- D. Deadlines for receipt of questions and clarifications and the procedures for such requests
- E. When to expect addendum(s) to be published for solicitation
- F. Provide an overview of the solicitation document(s) contracting requirements (i.e., certifications, business tax receipt, insurance requirements, etc.)
- G. Explain evaluation criteria and weighting, *if applicable*
- H. Discuss any requirements for submittal of the documents, explain the requirements and order for submitting the proposal
- I. Remind the proposers of the dates for the request
- J. Award review process
- K. Outline the protest procedures

Late Proposals: Any bid, proposal, or offer received at the place designated in the solicitation after the official date and time specified for receipt of proposals shall be deemed late and will not be considered for award. Any request for modification received after the date and closing time specified shall not be considered. The phone/computer clock at the receptionist desk on the first floor of City Hall is the official time for all times pertinent to formal openings.

Only One Bid Received: If only one responsible proposal is received, an award may be made to the single bidder if the City determines in writing that the price submitted is fair and reasonable. However, it is the practice of the City not to open a single bid received if for any reason the Purchasing Department feels that more bids can be obtained. Should this occur the Purchasing Department would extend the bid opening date, contact vendors that did not respond in an effort to obtain additional bids.

No Bid Received: On occasion, the Invitation to Bid will receive no responses. In those cases, these steps will be followed:

- A. Extend the bid-opening date.
- B. Contact all those vendors on bidder's list to determine reason for lack of response.
- C. Contact the user department to determine if rebid is desired, using information obtained from vendor survey.
- D. Notify Purchasing Department the closed bid if decision is made not to rebid.
- E. Review specifications and bid list if decision is made to rebid.
- F. Revise bid documents where appropriate.
- G. Initiate the bidding process per regular procedures.

Rejection of Bids and Negotiation: The Mayor and Council shall have the right to reject any/all bids. If the lowest and most responsible bid exceeds the budgeted amount and the Mayor and Council does not make additional funds available, the City Manager shall have the power to re-advertise the item(s) for bidding after making sufficient changes in the project plans to bring the cost within the limit of the money available.

If no bid is received, or if the best bid exceeds the budgeted amount, the City Manager shall advise the Mayor and Council in writing, the condition and the circumstances surrounding the bid. The Mayor and Council may then authorize the City Manager to purchase by negotiation, but this shall be done only under conditions most favorable to the public interest and when said purchase will result in the lowest ultimate cost for the goods or services obtained.

Competitive Procurement/Diversity Initiative Policy: Purchase or acquisitions made by the City of College Park shall be made through competitive bidding or competitive proposal unless expressly exempted from this requirement by other provision of this policy or by express authorization by the City Manager or the Mayor/Council.

The following are hereby declared exempt:

- A. Emergency purchases
- B. Acquisition or leasing of real property
- C. Purchases of > \$10,000.00
- D. Personal or professional services
- E. Sole source purchases or acquisitions

The City of College Park may “piggyback” purchase from other governmental contracts if such contracts are open to purchase by public authorities. As such, competitive bidding procedures do not apply or may be satisfied by the competitive process that was followed to award such governmental contract. The City has the discretion to enter into an inter-governmental agreement if the items to be acquired are available from these contracts. The bidding process has already been completed.

This policy shall also set forth the procedures for increasing opportunities for procurement and contract activities among Minority-Owned Businesses (MOB), African American Business

Enterprise (AABE), Hispanic Business Enterprise (HBE), Female Business Enterprise (FBE), Asian Business Enterprise (ABE) and Native American Business Enterprise (NABE) located within/outside the city limits of College Park Georgia. It is strongly encouraged to seek price quotations from the above various minority vendors when procuring goods and services. Dollar amounts above \$10,000.00 (sealed bids) a vendor questionnaire will be included in every bid packet. This questionnaire will be completed by the vendor and returned in the bid response and become part of the proposal.

Local Preference may be given to businesses that have a business location within the geographic boundaries of the City of College Park as long as all requirements of the bid have been met. Should a local vendor submit a bid proposal that is equal to a non-local vendor, then the local vendor's bid shall be recommended for approval provided all requirements of the bid proposal/process has been met.

The term business location means that the business has a staffed, fixed, physical place of business located within City of College Park City Limits and has had the same for a least one (1) year prior to the date of the business' submission of its proposal or bid, as applicable and has had held a valid business license from the City of College Park.

In order to receive local preference, the proposer must provide the following criteria and provide supporting documentation as required.

- A. If the vendor is located within the City of College Park, a copy of their current City of College Park business Occupational Tax Certificate (Business License) is required to be submitted when responding to request for proposals and bids.
- B. And copy of a lease or rental agreement located within the city limits of City of College Park.

In addition, the selected company will be required to comply with all existing State and Federal laws, including applicable equal opportunity employment provisions. The Contract between the company and the City shall be construed and governed in accordance with the law of the State of Georgia and the City of College Park. The company, at its own expense, shall secure all occupational and professional licenses and permits necessary for the fulfillment of its obligations under this contract.

Waiver of Irregularities: The Mayor and Council shall have the authority to waive any/all irregularities in any/all formal bids.

Evaluation of Proposals/Evaluation Phase: The evaluation phase as described below must be included in and carried out for all solicitations, even if only one proposal/response is received.

Prior to evaluating and scoring proposals, the proposals must first be examined to determine whether they meet the minimum requirements stated in the solicitation documents. The evaluation of these minimum requirements will be undertaken by the person responsible for conducting the solicitation process and will consider the following questions:

- A. Was the proposal received by the advertised deadline?
- B. Was there a mandatory pre-submittal meeting? *If so*, did someone representing the firm attend the pre-submittal meeting?
- C. Was the required documentation for the proposal included and signed?

- D. If the evaluation criterion for the cover letter was pass/fail, did the information contained within the cover letter satisfy the requirements?
- E. Did the proposer include responses for all criteria?

Proposers who fail to meet minimum requirements may be considered non-responsive and may be disqualified from further consideration (e.g., if a mandatory pre-submittal meeting was held and the firm's representative did not attend, their proposal must be disqualified and rejected). This preliminary evaluation is a measure of the potential consultant's ability to follow instructions and depending upon the evaluation criteria, may allow the City to determine if the evaluation committee will move the proposal forward for review.

Responses/proposals that are rejected due to their lack of responsiveness or non-conformity to the mandatory requirements will not be reviewed or evaluated by the evaluation committee. The Purchasing department will provide a written notice by e-mail to any proposer removed from consideration as part of the initial review for responsiveness.

Evaluation Committee: The evaluation committee should consist of a department director/manager or designee, project manager (if used), a staff member outside the requesting department/division, and one or more appointed staff members. The Purchasing Department director should assemble the committee. The evaluation committee may be selected based on their general knowledge of the subject matter, marketplace, City regulations, and understanding of the project, as well as for their ability to fulfill their time commitments and obligations as a member of the committee.

The committee should be formed ahead of time, but no later than the solicitation due date. The number of members and the make-up of the committee will depend upon the size and complexity of the project, but at least, there should be a minimum of three (3) and a maximum of seven (7) members, always an odd number.

Each of the committee members shall complete the evaluation process, from review through interview and/or oral presentations. By nature, the evaluation committees are short-term, highly focused, and often tightly scheduled. It is hard to predict how long it will take to conduct the evaluations of the proposals, as it is dependent on how many proposals are received and the corresponding quality and depth of the proposals. It is important that all committee members understand the level of commitment and follow-through required in serving on the committee, as committee operations are in addition to regular work assignments. If a member determines they are unable to complete the evaluation due to time or scheduling commitments, it would be best to replace that member at the onset; should a member not complete the evaluation process, any evaluations completed by this committee member must be discarded to eliminate any skewing of the final scores.

Technical Advisors: Whenever the department head/project manager anticipates using technical advisors in any capacity during the evaluation process, the solicitation document must specify that they may be used for evaluation purposes. Failure to include this information in the solicitation document will preclude advisors from any contact with committee members. Advisors are not authorized to be voting members of the evaluation committee; they may only be used to support the committee.

When technical advisors will be present for interviews/presentations, all short-listed proposers must be notified of their presence. A clear explanation must be provided of what the advisor's role will be during and after the interviews/presentations.

SECTION X
AWARD OF BIDS and CONTRACTS

All contracts, when the sum is \leq \$10,000.00, shall be awarded by the City Manager to the lowest and best bidder. The Mayor and Council shall approve all contracts when the sum is \geq \$10,000.00 to the most responsive and responsible bidder.

Initial Award: All bids shall be awarded to the most responsive and responsible bidder, unless additional criteria and qualifications are established by the solicitation. If no criteria are specified in the solicitation, the award will be based upon the price alone. The award of all contracts shall fall within the guidelines stated above.

Best Bidder: After determining the most responsive and responsible bidder, in addition to cost, the bidder shall demonstrate the ability, capacity and skill to perform the contract.

- A. Demonstrate they can perform the contract within the time specified, without delay or interference.
- B. Demonstrate good character, integrity, reputation, judgment, experience and efficiency.
- C. Demonstrate the quality of performance of previous contracts.
- D. Demonstrate their existing compliance with laws and ordinances relating to the contract.
- E. Demonstrate their sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service.

The quality, availability and adaptability of the supplies or contractual services to the particular use required. The bidder's ability to provide maintenance and service to the item(s) provided, for the use of the contract, if needed in the future. The number, scope of work or services must be attached to the bid.

Tie Bids: With assistance from the Purchasing Department, the City Manager shall make recommendation of award of all tie bids.

A tie can exist when two (2) or more bidders offer identical prices for a product, good, or service that meets all specifications, terms and conditions. In such a situation, the City shall consider the following methods to resolve the tie.

- A. Past performance of the vendor
- B. Best delivery date
- C. Closest proximity to delivery site

SECTION XI

COOPERATIVE PURCHASING and GOVERNMENTAL CONTRACTS

Where standardization is determined to be desirable by the City Manager, the purchase of materials, supplies and equipment and certain contractual services may be negotiated with the approval of the Mayor and Council.

The City Manager shall have the authority to join with other units of governments in cooperative purchasing ventures when the best interest of the City would be served thereby, and same is in accordance with City and State Law.

The City Manager may elect to purchase through or join with other governmental units or agencies in cooperative purchasing ventures when the best interest of the City would be served, provided the same is in accordance with all applicable laws. In the event the City Manager should elect to purchase through or join with other governmental agencies in cooperative purchasing ventures, all purchases in excess of ten thousand (\$10,000.00) would require Mayor and Council approval before the purchasing contracts are entered into.

Cooperative purchasing is the consolidation or combination of needs by two or more entities, which are then collectively bid out as one. In a cooperative bid, all entities agree to be bound by the contract award in the same manner as if they are one agency. These requirements protect the principle that a bidder should be committed to the resulting contract.

Another form of cooperative purchasing is based upon central warehousing. Customarily, the largest consumer of the governmental units involved will buy in carload and truckload quantities and smaller government units can pick up certain types of items from the buyer's warehouse. This type of cooperative purchasing like the contractual commitment method protects the principals of competitive bidding because the bidder knows the commitment covered by the ITB and the award.

Piggyback Purchases: Although this is cooperative purchasing, the process is NOT to be confused with cooperative bidding. When it has been determined that a commodity or service designed to meet the specific needs of the acquiring department and that particular item or service is already available and has been bid and awarded previously by another governmental entity the process of purchasing that commodity or service is called "piggybacking."

Simply put, it requires written acknowledgment from both the successful bidder and the government entity, which did the soliciting, granting their approval that they will allow the City of College Park to acquire that item or service under the same prices, terms, and conditions of the original contract with the exception allowances only for the differences in delivery costs. As with the State of Georgia contracts, the contract prices in effect become the ceiling prices.

Piggybacking practices places the successful bidders who have won state contracts in open competition, in the position of having their contract prices presented as targets for others to negotiate around or play against if it were bid again. This process allows an entity to acquire the same products or services without jeopardizing that contract, by simply having the political entity authorize the "piggybacking".

Departments/Divisions/User Agents State, Government Agency and Organizations contracts have already been competitively bid; therefore, the need to bid is satisfied for purchases of this nature. This method of purchase should only be used if time is of the essence or if the chances for obtaining

better prices from other sources is poor. Utilization of these sources eliminates the need for a formal waiver of competitive bids.

The work/services/commodities must be specifically within the scope of the contract and the contract must be active. A purchase cannot be made against a contract that has expired.

Piggybacking From Other Governmental Entities: The Purchasing Department requires that when piggybacking from other governmental entities, the department/division provides and attaches to the requisition process the following documents:

- A. A complete copy of the original solicitation;
- B. A bid tabulation, if solicited by an Invitation to Bid, or scoring matrix if an RFP was used;
- C. A copy of the award letter/memo/agenda item by the governmental entity to the vendor must be obtained;
- D. A complete copy of vendor's proposal or bid;
- E. A complete copy of the contract executed by the governmental entity and the vendor and;
- F. A copy of the written acknowledgement from the governmental entity and vendor authorizing the city to acquire such goods or services under the same prices, terms, and conditions of the original contract with the only exception being for the differences in delivery costs.

SECTION XII

BONDS AND INSURANCE

BONDS: Bonds offer tangible protection in the form of monetary assurances that the bidder will meet its obligations. They are necessary to protect the City in the event a contractor fails to pay a subcontractor, or a subcontractor fails to pay a sub-subcontractor. In such situations, the City will generally be liable to the unpaid subcontractor or sub-subcontractor if bonds are not obtained. Georgia law sets the minimum bonding requirements for public works construction contracts and road construction contracts. This policy is more restrictive than the minimum statutory requirements to ensure the City's full compliance with state law. Bonds must be secured by the bidder at its own cost and are generally classified as follows:

- A. **Bid Bond:** Each Bid valued at \$5,000.00 or more must be accompanied by a Bid Guarantee in an amount of not less than five percent (5%) of the amount of the bid. The Bid Guarantee may be in the form of an official bank check payable to the City or an AIA Document A310 Bid Bond on a form provided by a licensed surety bonding company. The Bid Bond shall be issued by a surety company that meets the City's requirements as provided in subsection C below.

- B. **Performance and Payment Bonds:** For all construction contracts that are valued at \$5,000.00 or more, a Performance Bond and a Payment Bond, each equal to 100% of the Contract Price, must be provided by the successful Bidder. Performance and Payment Bonds are issued in the form of a firm commitment by a surety company that meets the City's requirements as provided in subsection C below. A construction contract solely for engineering or other professional services is exempt from this requirement. *All Performance and Payment Bonds shall be submitted to the City Attorney for review and approval.*

- C. **Sureties:** Sureties are subsidiaries or divisions of insurance companies that issue contract and commercial surety bonds. Sureties guarantee the full and faithful performance of a contractor's contract obligations and the payment of labor and material expended pursuant to the contract. The vast majority of surety bonds in the United States are written by these insurance companies regularly engaged in the business of acting as a surety. The City shall review and confirm that the surety issuing bonds for a construction project meets the requirements set forth herein. The surety must:
 - a. Be licensed to write bonds in the State of Georgia;
 - b. Listed in the most current U.S. Treasury Circular No. 570; and
 - c. Have a current A.M. Best rating of "A±" (Excellent).

Construction Contracts	Bid Bond	Performance Bond	Payment Bond	Attorney Review
\$0- \$4,999.99	N/A	N/A	N/A	N/A
\$5,000 and up	5% of contract price	Required. bond amount must be equal to value of contract	Required. bond amount must be equal to value of contract	Always required

INSURANCE: Insurance is required to safeguard the City from any claims resulting from damage to property and/or injury to persons caused by the vendor or his actions. The vendor, at his own cost, must secure insurance policies that name the City as an “additional insured” party. Proposers are required to submit proof of insurance to the City with their bid/proposal including the types and dollar amounts of coverage.

The following requirements are for use with construction type contracts or when a contract is utilized or any work will be done on City’s property.

- A. **Worker’s Compensation:** The selected bidder shall agree to maintain Worker’s Compensation Insurance & Employers Liability in accordance with O.C.G.A. Title 34, Chapter 9, as amended.
- B. **Business Auto Policy:** The selected bidder shall agree to maintain Business Automobile Liability at a limit of liability not less than \$500,000.00 each occurrence for all owned, non- owned and hired automobiles. In the event the bidder does not own any automobiles, the Business Auto Liability requirement shall be amended allowing the Bidder to agree to maintain Hired & Non-Owned Auto Liability. This amended requirement may be satisfied by way of endorsement to the Commercial General Liability, or separate Business Auto Coverage form.
- C. **Commercial General Liability:** Commercial General Liability for public liability during the lifetime of a contract shall have minimum limits of \$1,000,000.00 per claim, \$2,000,000.00 per occurrence for Personal Injury, Bodily Injury, and Property Damage Liability. Coverage shall include Premises and/or Operations, Independent Contractors, Products and/or Complete Operations, Contractual Liability and Broad Form Property Damage Endorsements. Coverage shall not contain an exclusion or limitation endorsement for Contractual Liability or Cross Liability. Coverage for the hazards of explosion, collapse and underground property damage must also be included when applicable to the work to be performed. All insurance policies shall be issued from a company or companies duly licenses by the State of Georgia. All policies shall be on occurrence made basis; the City shall not accept claims-made policies. Specific endorsements will be requested depending upon the type and scope of work to be performed.
- D. **Professional Liability:** The selected bidder shall agree to maintain Professional Liability or equivalent Errors & Omissions Liability at a limit of liability not less than \$1,000,000.00 per occurrence. When a self-insured retention or deductible exceeds \$10,000.00, the City reserves the right, but not the obligation, to review and request a copy of bidder’s most recent annual report or audited financial statement. For policies written on a “Claims-Made” basis, bidder warrants the

retroactive date equals or precedes the effective date of this contract. In the event the policy is canceled, non-renewed, switched to an Occurrence form, retroactive date advanced; or any other event triggering the right to purchase a Supplemental Extended Reporting Period (SERP) during the life of a contract, bidder shall agree to purchase a SERP with a minimum reporting period not less than three (3) years. For use with consultants or engineers only.

- E. **Additional Insured Requirements:** Except as to Worker's Compensation and Employees' Liability, said certificate(s) shall clearly state that coverage required by the contract has been endorsed to include the City, a municipality of the State of Georgia. The name for the additional insured endorsement issued by the insured shall read "City of College Park" along with the contract and bid number. The certificate of insurance shall unequivocally provide thirty (30) days written notice to the City prior to any adverse changes, cancellation, or non-renewal of coverage thereunder.
- F. **Subcontractors:** It shall be responsibility of the selected bidder to ensure that all subcontractors comply with the same insurance requirements reference above.
- G. **Deductible Amounts:** All insurance deductible amounts shall be paid for and be the responsibility of the selected bidder for any/all claims under the contract.

Indemnification: The selected bidder shall indemnify, defend and hold harmless the City, its representatives, employees, elected and appointed officials, from and against all claims, costs, demands, legal fees, costs of action, losses, damages or other expenses arising as a result of any negligent act, conduct, error or omission by the City, its agents, employees in the performance of their contract or occasioned wholly or in part by any negligent act, conduct, error, or omission by the selected bidder, or its agents, employees or subcontractors, in the performance of their contract.

SECTION XIII
CAPITAL ASSETS TRACKING

Fixed and Capital Assets: The City has established a capitalization threshold of \$5,000.00 for property expected to benefit the operations of the organization for multiple years to be considered a fixed asset.

- A. All property with an acquisition cost in excess of \$5,000.00 and an estimated useful life of one year is to be capitalized;
- B. Capital Assets include buildings and improvements; However, the disposition of real property shall be governed by O.C.G.A. § 36-37-1 *et seq.* and not by this policy.
- C. Property purchased meeting the fixed asset definition is tagged with a pre- numbered asset tag and added to the list of assets maintained by the Finance Department. This list is categorized by type of fixed asset (i.e., buildings, furniture and equipment, plant assets, etc.) and includes the asset number, date of installation, cost including taxes, shipping and installation fees, and life expectancy for depreciation purposes. A copy of the invoice(s) should be maintained with these asset records until the asset is sold or deleted.

Equipment Depreciation: The purpose of depreciation is to recognize the decreased value of the property over time (useful life) and to quantify this ‘usage’ as an expense to each cost center deriving benefit from its use.

- A. A fixed asset, as previously defined, is depreciated over its estimated useful life.
- B. Depreciation Schedules are prepared for the full fiscal year utilizing the guidelines of the Depreciation Policy.
- C. A separate schedule is made for each property/asset type. The schedule is maintained by the Finance Director. As depreciable property is purchased, it is tracked in New World ERP and is added to the depreciation schedule at year end, following purchase/installation.
- D. Depreciation is run at year end.

Surplus of Capital Assets: All capital assets that are obsolete, excess, or no longer needed by the owning Department are to be reported to the Finance Department for disposition. All items must be listed on a Request to Transfer/Declare Surplus form (Appendix D) and submitted to the Finance Department. The Finance Department is responsible for approving the disposition of the capital assets. If the item is a transfer between departments, the Request to Transfer/Declare Surplus Form requires both the transferring and receiving Department Director’s signatures. The Capital Asset Coordinator will verify ownership, description, and identification number of the equipment on the form and approve the transfer or surplus of the item. Upon approval, a copy of the form will be provided to Finance to update the computerized inventory.

Disposition of Property: Non-capital items such as broken chairs, tables, calculators, desk accessories, books, tools, which are considered as “junk”, may be disposed of via the landfill or trash by the individual department(s).

Capital Assets that have identification numbers can be disposed of by one of the following manners:

- A. By transferring to another department or division
- B. By trading in on equipment
- C. By selling as scrap
- D. By notification of sale at public auction conducted by GovDeals

How to Report: Each department, division or authority shall report its surplus or obsolete stock, equipment or materials on the "Notification of Surplus Property", (see attachment).

When to Report: All departments or separate units shall submit to the Purchasing Department, on the provided form(s), a report of surplus or obsolete property as follows:

- A. When the department(s) identifies equipment such as motor vehicles, bulldozers, mowers, etc., to be traded for new equipment or to be otherwise disposed. In addition; the department(s) should include a list of all spare parts for such equipment if they are obsolete or surplus as well.
- B. Scrap such as aluminum, bronze, brass, steel, etc., to be sold shall be reported or at such intervals as will be advantageous to the best use of the storage area of the department in question. Such material shall be kept separated to enable an accurate, intelligent estimate of the quantity or weight to be made.

SECTION XIV

VENDOR REGISTRATION

It is suggested that all vendors desiring to sell goods and services to the City complete an online vendor application under “Vendor Registration” within the Purchasing Department tab via the City website.

Vendors may make application by accessing the City’s web page at www.collegeparkga.com then follow these steps in order to register:

- A. Use the Departments tab and search for Purchasing
- B. A link for Vendor Registration will appear.
- C. Click link [Become a College Park Vendor](#), this will redirect you to another screen to register. Complete all fields, to establish an account with the City of College Park Vendor Registration System (Vendor Registry.com). Follow steps as prompted to complete your account.
- D. Once completing the registration:
 - a. Return to the City of College Park website at www.collegeparkga.com
 - b. On the home screen look for Bids/RFPs link
 - c. Under the Bid Posting post complete the notification link under the Subscription to receive notification of new solicitations.

All complaints concerning vendor performance shall be directed to the Purchasing Department in writing using the Vendor Performance Evaluation Form (Appendix F). Finance will investigate any charges against a vendor and shall take whatever action is warranted to correct the problem. An example of a performance complaint is failure to deliver goods and/or services as outlined in an Invitation to Bid. Appropriate action might be cancellation of bid award, liquidated damages, or some other punitive damages.

It is essential to develop and maintain goodwill between the City of College Park and its suppliers. The reputation of the City can be promoted by:

- A. Giving all salespersons a full, fair, prompt and courteous hearing.
- B. Respecting the confidence of the salesperson or their company as to confidential information.
- C. Having consistent buying policies and principles
- D. Observing strict truthfulness in all transactions and in correspondence.
- E. Keep the bidding and purchasing process open, fair, and transparent.
- F. Cooperating with the seller and considering their difficulties in providing the service or products.

G. Keep the lines of communication open for all vendors

H. Making payments in a timely manner.

Vendor set up in system

All new vendors to be established in the New World system that will be issued a check from the Finance Department should have a W-9 on file with the Purchasing Department. This process shall ensure the most accurate information is entered into the system for the vendor(s).

Before requesting a vendor is set up as a vendor in the system, there are a few things to keep in mind:

- A. Current College Park employees cannot provide goods or services as an independent contractor.
- B. No former College Park employee or elected official, may enter into a contract as an independent contractor for three (3) years from the date of separation.
- C. No College Park employee or department may buy goods or services for the City from a vendor who is a member of the employee's family.
- D. No College Park employee or department may buy goods or services for the City from a vendor where an employee owns or controls at least 10% of the business.

The requestor will need to forward a current, signed, and dated W-9 form. Vendors will be established in their name as they appear on their W-9s; DBA name, if applicable. The set-up requests normally take between 3-5 business days.

Upon establishing the new vendor; a purchasing representative will forward the vendor number to the requestor in order for him/her to complete a check request or purchase order within the New World system.

SECTION XV
ETHICS in PROCUREMENT

Conflict of Interest and Disclosure of Campaign Contributions: Every person, business or entity involved in the procurement process must adhere to a high standard of ethics. Each will be bound by the City Code of Ethics and this Section. Whenever this Section conflicts with the City Code of Ethics, the City Code of Ethics shall control. For the purposes of this section, the term “City Employee” means any person employed by the City of College Park, and the term “City Official” means any elected or appointed official of the City or of an agency, authority or instrumentality of the City.

A. Employee Conflict of Interest

It shall be unethical for any City Employee or City Official to transact any business or participate directly or indirectly in a procurement contract when the City Employee or City Official knows:

1. The City Employee or City Official or immediate family of such has a substantial interest pertaining to the procurement contract, except that the purchase of goods and services from businesses which a member of the city council or other City Employee has a substantial interest is authorized as per O.C.G.A. § 36-1-14, or the procurement contract is awarded pursuant to O.C.G.A. § 45-10-22 and § 45-10-24, or the transaction is excepted from said restrictions by O.C.G.A. § 45-10-25, interpreting such statutes as if they were applicable to a municipality.
2. Any other person, business or organization with whom the City Employee, City Official or immediate family of such is negotiating or has an arrangement concerning prospective employment is involved in the procurement contract.
3. A City Employee, City Official or any immediate family of such who holds a substantial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that substantial interest.
4. All City Employees and City Officials will be asked to sign a disclosure document indicating his or her compliance with the City Code of Ethics Policy.
5. The terms “immediate family” and “substantial interest” shall have the meaning given to such terms in the City Code of Ethics.

B. Gratuities, Rebates or Kickbacks

1. *Gratuities and other benefits.* It shall be unethical for any City Employee or City Official to directly or indirectly solicit, demand, receive, accept or agree to receive any gratuity, reward, offer of employment, services or things of value from any person, business or entity in connection with any award, decision, approval, disapproval, recommendation or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal.
2. It shall further be unethical for any person, business or entity to offer, give or agree to give or offer to give any City Employee or City Official any gratuity, reward, offer of employment, services or things of value with the purpose of influencing any award,

decision, approval, disapproval, recommendation or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal.

3. A “thing of value” shall not include:
 - i. Any gift with a value less than one hundred dollars (\$100.00);
 - ii. Food or beverage consumed at a single meal or event;
 - iii. An award, plaque, certificate, memento or similar item given in recognition of the recipient's civic, charitable, political, professional or public service;
 - iv. Promotional items generally distributed to the general public or to public officers;
 - v. Rebates normally or routinely offered to customers in the ordinary course of business of such person, business or entity for the purchase of their goods and services are acceptable and are the property of the City; and
 - vi. Educational events, materials and meals as described in subparagraph (ii).
4. *Educational events.* Nothing in this section shall preclude a City Employee or City Official from attending seminars, courses, lectures, briefings or similar functions at any person, business or entity’s facility or at any other place if any such seminar, course, lecture, briefing or similar function is for the purpose of furnishing the City Official, City Employee or agent with knowledge and information relative to the person, business or entity’s products or services and is one which the city manager determines would be of benefit to the City. In connection with any such seminar, course, lecture, briefing or similar function, nothing shall preclude the City Employee or City Official from receiving meals or educational materials and business-related items of not more than nominal value from a person, business or entity. However, no City Employee or City Official shall accept or receive travel or lodging for less than the value thereof from a person, business or entity.
5. *Kickbacks and rebates.* It shall be unethical for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

C. Disclosure of Campaign Finance Contributions

1. All vendors/contractors who do business with the City for purchases from ten thousand dollars (\$10,000.00) and above, which require a sealed bid process under the terms of the City of College Park’s Purchasing Policies and Procedures, shall be required to file a written campaign contribution disclosure form as a part of the solicitation process. Said form shall itemize all monetary contributions totaling \$100.00 or more that the vendor/contractor made within the preceding twelve (12) months to: (i) any elected City Official’s campaign; and (ii) any event sponsored by an elected City Official. *See Appendix K.*
2. Unless otherwise reported individually, where separate contributions of less than one hundred dollars (\$100.00) are knowingly received from a common source, such contributions shall be aggregated for reporting purposes. For purposes of fulfilling such aggregation requirement, members of the family, members of the same firm or

partnership or employees of the same person as defined in paragraph (19) of O.C.G.A. § 21-5-3, shall be considered to be a common source; provided, however, that the purchase of tickets for not more than twenty-five dollars (\$25.00) each and for attendance at a fundraising event by members of the family, members of the same firm or partnership or employees of the same person shall not be considered to be contributions from a common source except to the extent that tickets are purchased as a block.

3. For each year a vendor/contractor is under contract at any value annually and engaged in business with the City, it shall be required to file a campaign contribution disclosure form to the City Manager.

D. Prohibition against Contingent Fees

It shall be unethical for any person to be retained, or to retain a person, to solicit or secure a contract upon any agreement or understanding for a contingency fee, except for agreements with manufacturer representatives, or agents, including, but not limited to, commercial services sales agents engaged in the business of soliciting contracts on behalf of vendors. A “contingency fee” as used in this subsection C means any commission, percentage, brokerage or other fee that is contingent upon the success that a person has in securing a city contract.

E. Use of Confidential Information

It shall be unethical for any City Employee or City Official to knowingly disclose or use confidential information for actual or anticipated personal gain or for the actual or anticipated personal gain of any other person.

F. Unauthorized Purchases

No purchases of goods and services shall be made in the name of the City or one of its departments, except such as is required for official use by the City or one of its departments. Purchases in the name of the City or a department for personal use by an individual or for other than official use are prohibited, and no City funds will be expended or advanced therefore.

G. Penalties and Sanctions

1. *Legal or disciplinary action by city council.* The city council may take appropriate legal and/or disciplinary actions pursuant to the City Code of Ethics against any City Employee, City Official or other person in violation of these ethical standards.
2. *Legal or disciplinary action by city manager.* The city manager is authorized to take any appropriate legal and/or disciplinary actions, including dismissal, of any City Employee violating this City Code of Ethics Policy.
3. *Administrative penalties for employees.* The city manager may impose any one or more of the following penalties or sanctions on a City Employee for violations of the ethical standards in this Section as appropriate to the situation, subject to the Personnel Manual or other appropriate appeals procedures:
 - i. Oral or written warnings or reprimands;
 - ii. Suspensions with or without pay for specified periods of time; or
 - iii. Termination of employment.
4. *Administrative penalties for outside contractors/vendors.* The City may impose any one or more of the following penalties or sanctions on a vendor or other person or

organization for violations of these ethical standards:

- i. Written warnings or reprimands;
- ii. Termination of contracts; or
- iii. Debarment or suspension.

Disclaimer of Responsibility for Improper Purchasing

The City may disclaim responsibility and liability for any purchase, expenditure or agreement for expenditure arising from any procurement made in its name, or in the name of any governmental body under its authority, by an unauthorized person or any person acting outside this policy or the authorization or delegation as provided in this policy. The expense of any such disclaimed transaction will become the personal liability of the individual who acted improperly.

Vendor Contact during Open Solicitations

Persons seeking an award of a City contract may not initiate or continue any verbal or written communications regarding a solicitation with any City Official, City Employee or other City representative other than the purchasing agent named in the solicitation between the date of the issuance of the solicitation and the date of the final contract award. The city manager or designee will review violations. If determined that such communication has compromised the competitive process, the offer submitted by the individual, firm or business may be disqualified from consideration for award.

Cooling Off Period

A "Cooling Off" period is the time during which an employee is separated from participation in all official matters involving an entity because of a particular situation.

It is required that a former City of College Park employee in addition to elected or appointed City of College Park official cannot conduct business with the City of College Park from the date of separation; for a period of three (3) years from the date of separation. In this capacity, their new employer might find an employee's former connections to government agencies quite valuable when it comes to getting clarification on rules and regulations.

- A. Former College Park employees nor elected or appointed City Officials cannot be independent contractors to perform work related to contracts in which they engaged in any negotiations, transactions, planning, arrangements, or any part of the decision-making process relevant to the contract while employed in any capacity by any department.
- B. Former College Park employees nor elected or appointed City Officials cannot be independent contractors to perform work on a contract if they were employed by that department in a policy-making position in the same general subject area as that contract.

SECTION XVI
DISQUALIFICATION and PROTEST PROCEDURES

Disqualification/Debarment of Bidders: The Purchasing Department will have the authority to declare vendors who default their quotations irresponsible bidders and to disqualify them from receiving any business from the City for no less than five (5) years, from the date of discovery.

- A. Fraud, bribery, collusion or conspiracy;
- B. Bid rigging, price fixing or any other act in violation of any local, state or federal law in connection with the bidding upon, solicitation, award or performance of any public contract;
or
- C. Embezzlement, theft, forgery, falsification or fabrication of records, moral turpitude or perjury.

Protest: Any interested party desiring to protest, challenge or otherwise pursue a claim against any aspect of College Park procurement must comply with College Park's Protest Policy.

Form of Protest

Bidders or respondents who are aggrieved in connection with a formal solicitation or with the City's recommendation for award shall be afforded the opportunity to submit a written notice to the Purchasing Department. Bids or proposals that did not meet the minimum published requirements including specifications and/or scope of service, are not subject to protest.

At a minimum, the protest must be submitted in writing and must include the following:

- A. The name and address of the protestor;
- B. Appropriate identification of the solicitation/sole source notice/consortia or cooperative notice;
- C. A statement of all legal and factual grounds for the protest;
- D. Supporting exhibits, evidence or documents to substantiate any claims unless not available within the filing time (in which case the supplier must proceed to file the protest within the filing period identified below, but state the expected availability of the material); and
- E. A statement of the specific relief or remedy requested and;
- F. Signature of an officer or person authorized to execute contracts on behalf of the protestor.

To ensure the protest process is conducted efficiently and in a manner fair to all parties, the City of College Park requires a protesting supplier to identify all grounds for protest during the protest filing period. Any issues or grounds not timely raised within the written protest shall be deemed waived by the protestor.

Filing Protests

A protest is considered to be properly filed when it is in writing and signed by a company officer authorized to sign contracts on behalf of the supplier or legal counsel that has been engaged by the

supplier, is submitted via e-mail to the Purchasing Department, and is received within the filing period.

Filing Deadlines

Protests must be received within five (5) calendar days after the protesting party knows or should have known of the occurrence of the action which is protested. The City of College Park will not consider untimely protests absent evidence of malfeasance or administrative error by the City that substantially impaired an interested supplier's ability to file a timely protest.

In the event the City does not provide access to records included in the register of proposals or the administrative review within three (3) business days of issuance of the Notice of Intent to Award, the interested supplier may file, within the filing period, a request for extension of the filing period to extend the protest period by the number of days that it takes for the City to produce the records beyond the first business day. In the event the City does not provide timely access to records other than those that comprise the register of proposals or administrative review, the interested supplier is required to file a protest within the filing period, indicating the failure of the state entity to provide timely access to records and reserving the right to file an amended protest upon production of such records.

If an interested supplier fails to file a protest by the applicable deadline, the City of College Park may, at its discretion, deem such failure as the supplier's voluntary relinquishment of any grounds the supplier may have for protesting through the City of College Parks' protest process or through subsequent litigation.

Protest Resolution

The Purchasing Department shall prepare and submit written determination to the City Manager recommending either approval or disapproval of the petition. The City Manager and City Attorney for the City of College Park will review and issue a written decision on the protest as expeditiously as possible after receiving all relevant documents.

In the event that a solicitation, a sole source notice, or a consortia/cooperative notice is cancelled or amended by the City prior to issuance of a decision, the protest will be deemed moot and no further action will be taken by the City of College Park regarding the protest.

The petitioner shall be furnished a copy of the decision and the final decision under this section shall be conclusive and shall represent the position of the City

Costs

In no event will a supplier be entitled to recover any costs incurred in connection with the solicitation or protest process, including, but not limited to, the costs of preparing a response to the solicitation, the costs of participating in the protest/request for formal review process or any attorneys' fees.

APPENDICES

**FINANCE DEPARTMENT
PURCHASE ORDER CHANGE FORM**

PO Date:		PO #:	
Vendor No:		Vendor Name:	
PO Account No:			
Original PO Amount:			
Requesting Depart:			
Reason for charge:			

Type of Change
(complete one)

	Change account number(s)
All or specific line(s):	_____
Original account number(s):	_____
New account number(s):	_____

	Increase purchase order
All or specific line(s):	_____
Amount to increase:	_____
New PO total:	_____

	Decrease purchase order
All or specific line(s):	_____
Amount to decrease:	_____
New PO total:	_____

	Cancel/Void PO
All or specific line(s):	_____
Amount to cancel/void:	_____
New PO total:	_____

Department Head Approval

Date

Finance Director Approval

Date

City Manager Approval

Date

Purchase Order Change Notices are reviewed to determine conformance to established Purchasing Policies and adhere to relevant agreements, bids, contracts and policies.

**CITY OF COLLEGE PARK
EMERGENCY PURCHASE EXPLANATION MEMO**

General description of material(s) and/or service purchased

Nature of emergency affecting safety, health, or welfare of the public. Be concise but describe the emergency completely.

Vendor: _____
Total actual cost of emergency purchase: _____
Prepared by: _____
Date Prepared: _____

Department Head Approval Date

Finance Director Approval Date

City Manager Approval Date

Attached invoice(s) and all supporting documents and forward for review, approval and processing

**SOLE/SINGLE SOURCE/ SOLE BRAND
REQUEST FORM**

Date:	
To: City Manager	
Thru: Finance Director	
From (department):	
Product/Service Description:	

Section I

It is the policy of the City of College Park to consistently purchase goods and services using full and open competition. The taxpayers in College Park are best served when we make sound business decisions based on competitive bids or proposals. However, there may be instances when other than full and open competition may be justified. When the user department(s) determines that other than full and open competition is necessary or in the best interest of City of College Park, appropriate justification for that course of action must be submitted to the City Manager for approval in order to waive the competitive procurement process.

Sole Source (use for single purchase only) the supply of a product or service so exclusively qualified that it is only available from a solitary source.

Single Source (use for single purchases only) the supply of a product or service which may be available from multiple sources, but a specific vendor is uniquely* qualified and meets the users' requirements

Sole Brand (use for single purchases only) this is a specified service or product that has unique specifications to successfully meet the needs of the department and no alternate brands are acceptable

Standardization (used for multiple purchases and can be combined with the above; i.e. Standardization/Sole Source, Standardization/Sole Brand, Standardization/Sole Source/Sole Brand, etc.) This is the procedure of maintaining methods and equipment as constant as possible because of measurable benefits to the department. Competition among distributors of a standardization brand will be attained if possible.

Requested by: _____

Date: _____

Section II
QUESTIONNAIRE ALL QUESTIONS MUST BE ANSWERED

Order placed by:	
Proposed Vendor:	
Product(s):	
Estimate Cost of Purchase	

1. Explain why the product/service requested is the only product/service that can satisfy your requirements and explain why alternatives are unacceptable. Be specific with regard to specification, features, characteristics, requirements, capabilities and compatibility. Describe what steps have been undertaken to make this determination.

2. Please describe your market research and the result thereof. This should include a description of other similar sources or products available in the market, if any, and why they are not acceptable.

3. Explain the consequences(s), including a dollar estimate of the financial impact, if this item is not approved for the determination above.

4. I certify that the above statements are true and correct, to the best of my knowledge. I also certify that prices obtained are fair and reasonable. I also certify that neither I, nor my family members, will gain or receive any additional benefit because I have recommended that this acquisition be obtained solely from a designated vendor or contractor.

APPROVAL AUTHORITY: In accordance with the City of College Park Purchasing Manual procedures, it is requested that you review that information contained herein and make your recommendation begin/continue the above requested procurement.

Approved By: City Manager

Date:

City of College Park
 Notification of Surplus Property

Date:

From: *(Your Department Name)*

To: Fleet Administrator

This notice is hereby given that the following item(s) of equipment and/or material(s) will be declared surplus in this department. Disposition is being requested as of the date above.

<u>Item</u>	<u>Property #</u>	<u>Description</u> <i>(make, model, serial, number)</i>	<u>Disposition</u> <u>Code</u>	<u>Location</u>	<u>Estimated Value</u>
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

NOTE: Any/All items must be approved for disposal by Mayor and Council.

Disposition Codes:

- 1) Transfer to other department
- 2) To be sold as scrap
- 3) To be sold as usable equipment
- 4) To be sold "As Is"
- 5) To be traded on purchase of new equipment
- 6) Other reason for disposition (brief explanation):

Department Director: _____

Date Approved: _____

Director of Finance: _____

Date Approved: _____

VENDOR PERFORMANCE EVALUATION FORM

Vendor:		Date:			
Address:		Prepared by:			
Commodity/Service:		Department:			
	Excellent (4)	Good (3)	Fair (2)	Poor (1)	Comments:
Service					
Delivers on Time					
Condition of Goods on					
Follows Instructions					
Number of Rejections					
Handles Rejections Promptly					
Handling of Complaints					
Technical Assistance					
Emergency Aid					
Furnishes Specially Requested Information					
Delivers Without Constant Follow-up					
Keeps Promises					
Past Reliability Record					
Technical Ability For Difficult Work					
Personal Preference					
Other (_____)					
Overall Rating By Using Agency					
Overall Rating By Purchasing					

Instructions:

- Evaluate vendor on items listed and check the appropriate columns. Some items may not apply.
- Indicate vendor’s overall rating by checking the appropriate column.
- If vendor’s overall rating is fair or poor, please explain under “Comments”
- Upon completion return to Purchasing Department

E-VERIFICATION AFFIDAVIT

The College Park contract holder, signed below, confirms and verifies its compliance with Georgia law (See OCGA § 13-10-91), and affirmatively states that the business (Sole Proprietor, Partnership, Corporation, Non-Profit, LLC Corporation, or LLC Partnership) which performs services for the College Park: (check and complete #1 or #2 below)

___ 1. Has registered with, is authorized to use, and uses the federal work authorization program commonly known as “E-Verify”, or any subsequent replacement program. Furthermore, the undersigned will continue to use the federal work authorization program throughout the contract period. The undersigned will contract for the physical performance of services for the contract only with subcontractors who present an affidavit to the contract holder with the information required by OCGA § 13-10-91, as amended. The undersigned hereby attests that its federal work authorization user identification number and date for authorization are as follows:

_____ Federal Work Authorization User Identification Number (not Taxpayer ID)

_____ Date of Authorization

_____ Legal Business Name of City of College Park Contract Holder/Applicant

___ 2. Employs no employees, or otherwise does not fall within the requirements of OCGA § 13-10-91.

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on _____, 20__ in _____ (city) _____
(state)

Signature of Authorized Owner/Officer

Printed Name and Title of Authorized Owner/Officer

NOTARY PUBLIC

My Commission Expires: _____

NON-COLLUSION AFFIDAVIT

State of Georgia
County of Fulton

_____, being first duly sworn, deposes and says that he/she is _____ of _____, Proposer that has submitted the attached Proposal;

He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;

Neither the said Proposer nor any of its officers, partners, owners, agent representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm or person, to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit or cost element of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of College Park.

The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Signed: _____

Title: _____

Subscribed and sworn to before me this _____ day of _____, 20 _____

NOTARY PUBLIC
My Commission Expires: _____

DRUG FREE WORKPLACE CERTIFICATE
(Identical Tie Proposals)

In accordance with O.C.G.A. § 34-9-410 of the State of Georgia Statutes, preference shall be given to businesses with drug-free workplace programs. Whenever two or more proposals, which are equal with respect to price, quality, and service, are received by the State or by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process.

Established procedures for processing tie proposals will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free program, a business shall:

1. Publish a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
3. Give each employee engaged in providing commodities or contractual services that are under bid or proposal, a copy of the statement specified above.
4. Notify the employees that as a condition of working on the commodities or contractual services that are under bid or proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, plea of guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written statements to acknowledge their receipt.
5. Impose a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.

As a person authorized to sign this statement, I certify that the below named business, firm or corporation DOES DOES NOT] comply fully with the requirements set forth herein.

Company:	
Authorized Representative:	
Signature:	
Date:	

**CERTIFICATION OF ABSENCE OF CONFLICT OF INTEREST FOR
DEVELOPMENT OF SPECIFICATIONS OR SCOPE OF WORK**

**Required for each contract or arrangement to prepare or develop specifications or requirements for a solicitation or to serve in a consultative role during the procurement process for any City procurement method. O.C.G.A. § 36-80-28.*

The undersigned Consultant, who is entering into a contract or arrangement with the City of College Park, Georgia (the “City”) to prepare or develop specifications or requirements for bids, requests for proposals, procurement orders, or purchasing orders for the City, agrees and certifies that:

- (1) Consultant shall avoid any appearance of impropriety and shall follow all policies and procedures of the City, as may be related to the project.
- (2) Consultant discloses below any material transaction or relationship currently known to Consultant that reasonably could be expected to give rise to a conflict of interest, including, but not limited to, that of the Consultant, or Consultant’s employees, agents, or subsidiaries (include past, present, or known prospective engagements, involvement in litigation or other dispute, client relationships, or other business or financial interest):

- (3) Consultant shall immediately disclose any material transaction or relationship subsequently discovered during the pendency of the contract or arrangement.
- (4) Consultant acknowledges that any violation or threatened violation of this certification and agreement may cause irreparable injury to the City, entitling the City to seek injunctive relief in addition to all other legal remedies.

Company:	
Authorized Representative:	
Signature:	
Date:	

CAMPAIGN CONTRIBUTIONS DISCLOSURE FORM

Required for all purchases/contracts valued at \$10,000.00 or above for which a competitive procurement is required under the terms of the City’s Purchasing Policies and Procedures

Within the preceding twelve (12) months, have you or your company made monetary contributions totaling \$100.00 or more to (i) any elected City Official’s campaign; or (ii) any event sponsored by an elected City Official?

Yes*

No

*If you answered “Yes” to the above question, you must complete the following section:

Date	Name of City Official	Description	Amount

The undersigned certifies that the foregoing is true and correct to the best of undersigned’s knowledge.

Company: _____
 Authorized Representative: _____
 Signature: _____
 Date: _____

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