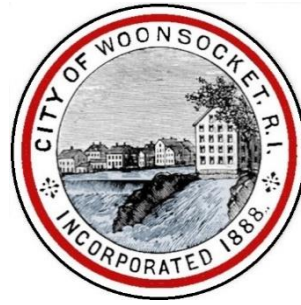


The City of
Woonsocket



Purchasing Department

**PROCUREMENT MANUAL
2023**

Revision A, 5/30/23



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INTRODUCTION

As stewards of taxpayer dollars, each Department within the City of Woonsocket is responsible to conduct all procurements in a deliberate, fair and ethical manner.

The Goals of the City's Purchasing Department are to:

- ❖ Provide quality goods and services in a fiscally responsible manner.
- ❖ Ensure equality, non-discrimination, and compliance in the procurement of City contracts.
- ❖ Be a key resource and foster cross-functional relationships.
- ❖ Make sure the proper procurement requirements are understood and met.
- ❖ Use best practices in the delivery of procured goods and services.

Purpose of this Manual

This manual has been developed to give you, the user, the tools necessary to make the best decisions when carrying out procurement activities on behalf of the City of Woonsocket.

It will provide you knowledge and the resources to navigate through the complex world of public procurement. It will define commonly used terms and acronyms. It will delineate the solicitation processes to be followed and the methods that are linked within them.

This manual gives a solid foundation for public procurement, guided by the laws and regulations found in:

- Woonsocket's City Charter, Chapter VIII
- Rhode Island General Laws, Title 45, Chapter 55
- Rhode Island General Laws, Title 37, Chapter 2
- R.I. Code of Regulations, Title 220, Chapter 30

This is considered a “living” document. It is called a living document because as processes, technology, business practices, laws and regulations change, this document should also adapt and be updated just-in-time to reflect the current, public, procurement environment it is meant to serve.

Purchasing Authority

The role of Purchasing Agent is fulfilled by, and reports to the Finance Department. The Purchasing Agent has the authority to enter into agreements on the City's behalf codified in Chapter VIII of the City Charter.

The Purchasing Agent is responsible for developing rules and policies that manage procurement transactions and for contracting goods and services for the City.

The Purchasing Agent manages and controls the central store inventory and takes the lead in the dispositioning of City property or assets that are not real estate related.

The Purchasing Agent finally is charged with ensuring that all the City's purchasing activities are following the most current local, state and federal procurement laws, policies and regulations.

PURCHASING'S GUIDING PRINCIPLES

Mission Statement:

To apply optimal purchasing methodologies; foster cross-functional, collaborative relationships; and safeguard open and diverse competition to increase public confidence in an innovative and responsible procurement process that maximizes the purchasing value of public funds.

Vision Statement:

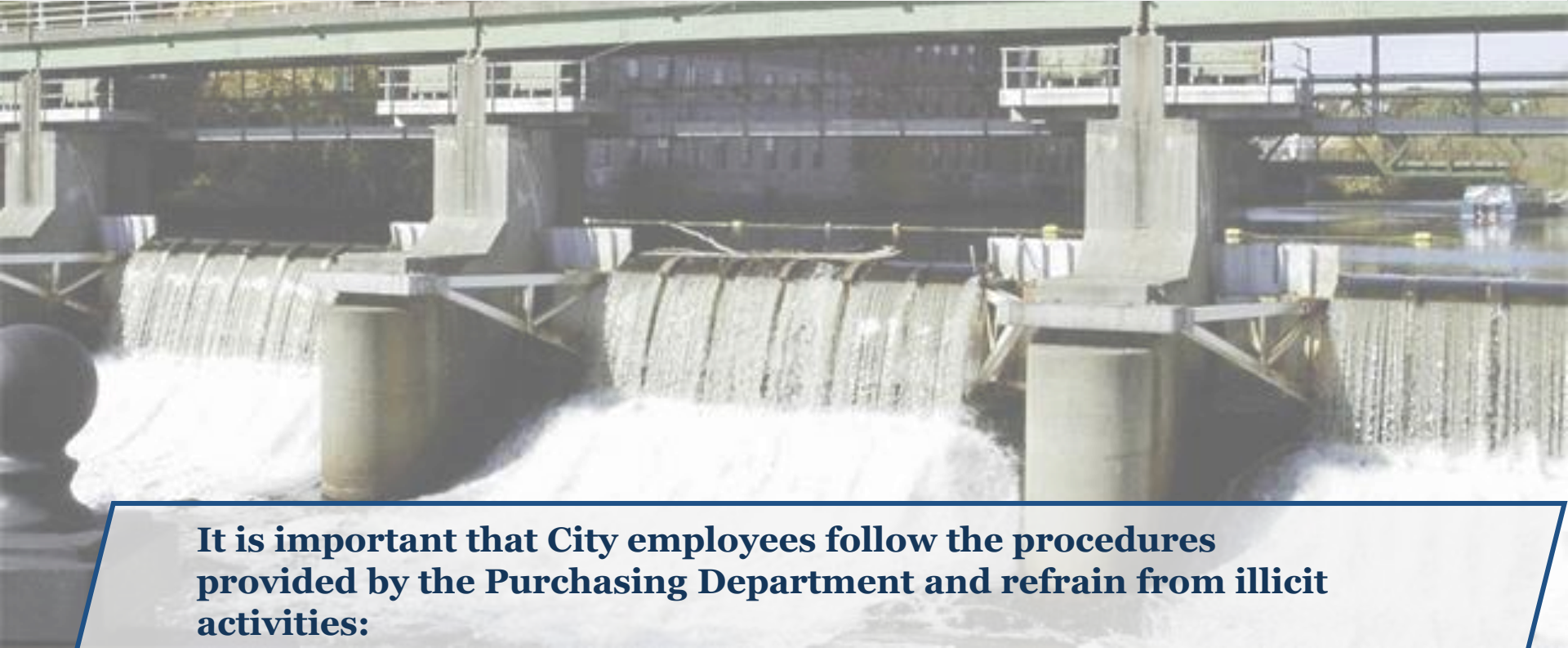
To become a benchmark for public procurement. One that embraces the modernization and the transformation of tools, processes and technology necessary to continually maximize efficiencies.

Ethics Statement:

The Purchasing Department has an obligation to uphold the highest, ethical standards in conducting the City's business. To achieve those high standards, the Purchasing Department supports and abides by the principles established in the "Code of Ethics".

PROCUREMENT LAWS

Even though the City is a charter City, there are still state and federal laws that apply to our procurement activities.



It is important that City employees follow the procedures provided by the Purchasing Department and refrain from illicit activities:

- ❖ Bid splitting (breaking up one large procurement into many smaller ones);
- ❖ Price Feeding;
- ❖ Committing the City's funds without using the proper procurement processes or methods; and
- ❖ Discussing open solicitations with any outside individual or organization to elicit certain responses.

ETHICS & CONFLICTS OF INTEREST

The competitive nature of public procurement, and the expenditure of public funds, requires unwavering ethics in all facets of the procurement process. The decentralization of procurement across a large organization can make this challenging for City staff and outside organizations.

It is a hard balance to strike a fostering, mutually beneficial supplier relationships, while not creating an appearance of impropriety.

City staff should always prevent conflicts of interest immediately upon the realization that a conflict exists and eliminate it from the procurement process.

Conflicts of Interest Examples:

- ❖ Employees may not work on a solicitation for a contract knowing that a member of their extended family has a financial interest in that contract;
- ❖ Employees should not accept gifts, favors or items of value from any active supplier or potential supplier;
- ❖ Employees may not disclose confidential information that could sway or influence a firm's bid response, change the outcome of an award, place the City's interests in harm's way or disclose information for personal gain.

If an incident occurs where information is provided to an individual or organization that could potentially affect the outcome of an award, staff must provide a statement to their supervisor and the Purchasing Agent to ensure proper precautions are taken to safeguard the procurement process.

The Purchasing Department abides by the strict **Code of Ethics** as published and detailed on the next page of this manual.

CODE OF ETHICS

The Purchasing Department is expected to uphold the highest professional and ethical standards in conducting the City's business. To achieve those high standards, the Purchasing Department supports and abides by the following ethical principles:



1.	To regard public service as a sacred trust.
2.	To take ownership and being responsible to stakeholders for our actions, essential to preserve the public trust and protect the public interest.
3.	Acting and conducting business with honesty and integrity.
4.	To guard against favoritism, improvidence, extravagance, fraud, and corruption.
5.	To refuse to accept any form of bribery and prevent any appearance of so doing.
6.	To ensure that contracts are awarded timely to the most responsible and responsive vendor that's in the public's best interest.
7.	Not only to avoid any impropriety, but to avoid even the appearance of an impropriety.
8.	Provide unbiased decision-making and action essential to ensure fairness for the public good.
9.	To the fullest extent of the purchasing power, foster effective competition from all segments of the vendor community, including small businesses, <u>minority</u> and women-owned and operated enterprises.
10.	To ensure appropriate public access to information by staying true to the principle of open and honest communication in every situation.
11.	Easily accessible and understandable policies and processes through transparency essential to demonstrate responsible use of public funds.
12.	To honor our obligations and require that obligations to the public be honored.
13.	To be receptive to counsel from our colleagues, and to cooperate with them to promote a spirit of teamwork and unity.
14.	To conduct ourselves with fairness and dignity, and to demand honesty and truth in the purchasing process.
15.	To strive for greater knowledge of purchasing methods and of the materials and services we purchase.

WE SUBSCRIBE TO THESE STANDARDS



Purchasing Department



City of Woonsocket

How Do I Begin the City Procurement Process?

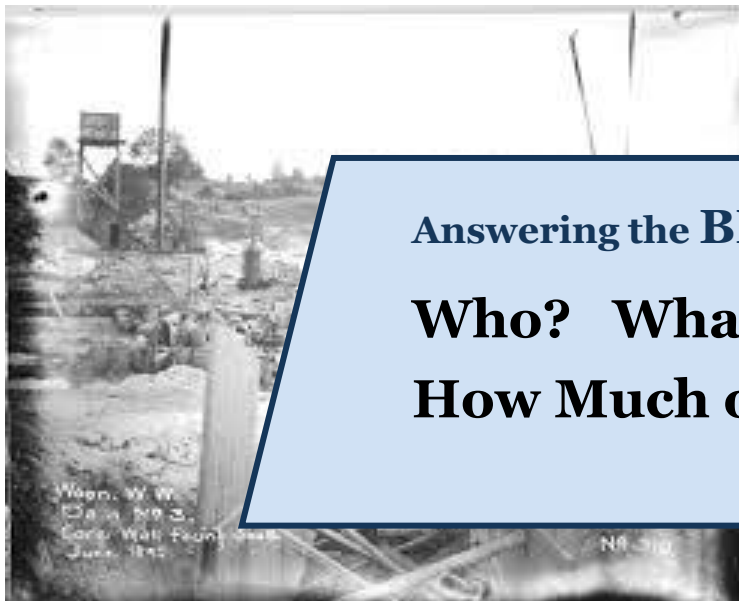
When the City identifies a need, which requires a purchase of some good or service, to fulfill that need, what procurement steps are necessary to get an approved contract in place to satisfy that need? Each step you follow below will lead you to a narrower path until you reach a single focal point to make that purchase.

- 1) First, Get a solid sense for the project scope, specifications and cost estimations.**
- 2) Next, the required procurement process will be clear.**
- 3) Finally, the process method you need will be understood and that method will lead you to a contract.**

If ever in doubt, contact the Purchasing Department. Rely on them as a resource for your team. They can advise you with your purchasing needs and your procurement process and method options.

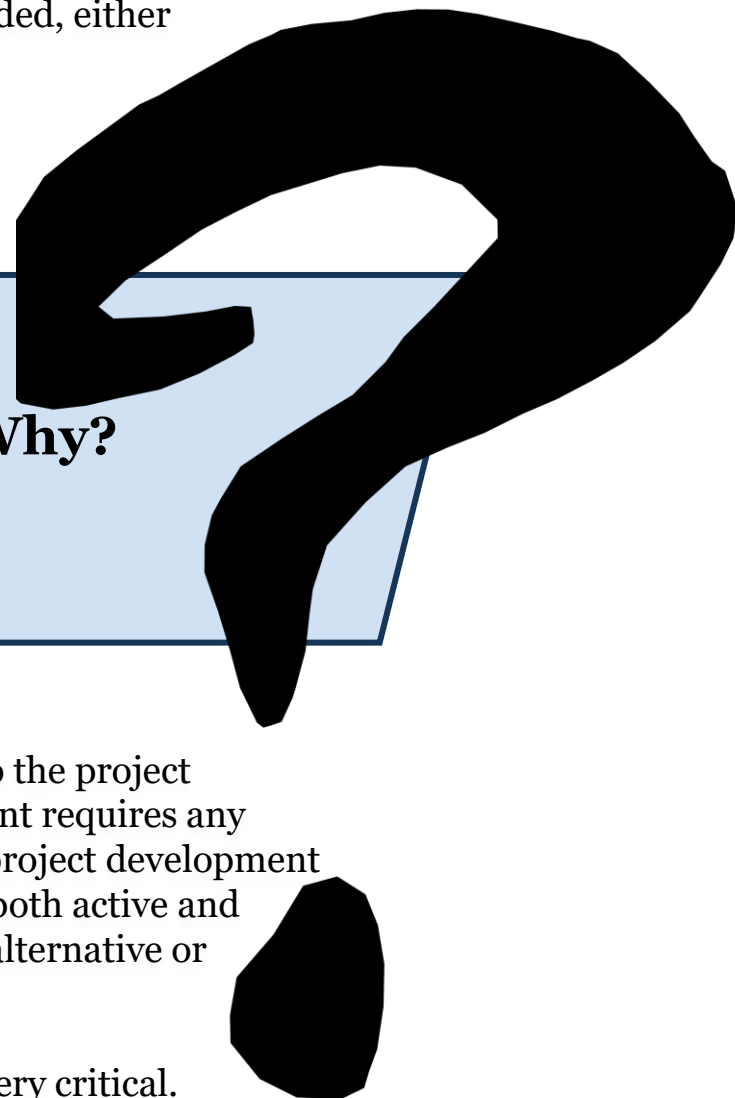
Where Should You Begin?

The very first step in any procurement process is deciding what is needed, either goods or services or maybe both.



Answering the **BIG 5:**

**Who? What? Where? Why?
How Much or How Often?**



It seems elementary, but these basic questions need to be answered so the project scope and specifications can be developed and written. If a Department requires any assistance, the Purchasing Department is there as a resource in your project development stage. The Purchasing Department has access to a multitude of bids, both active and closed, from agencies across the country. These may offer you a best alternative or may provide you with ideas you hadn't considered.

Regardless, developing the scope and defining the specifications are very critical. They become the foundation for the resulting agreement that the City will sign with the awarded firm. A good scope and well-defined specifications leaves very little open to interpretation and protects the City's interest.

TACKLING SCOPE & SPECIFICATIONS

For the City to obtain accurate cost estimates from an organization, specifications and project scopes need to be well-defined.

Information that is provided to prospective firms should be:

- ❖ Technically accurate, but not too proprietary as to limit responses;
- ❖ Specific as to size, color and characteristic but do not include specific supplier or manufacturer identification numbers (part numbers, stock numbers - SKU, etc.); and
- ❖ Developed by the City's subject matter experts and not potential firms.

Components of a well-defined scope and specification are:

- Product lists with a description of each component being requested;
- The quantity of the items or hours of service needed, this can include frequency;
- The timelines and specific dates or days of when the delivery or service is needed; and
- Specific delivery requirements, if any.



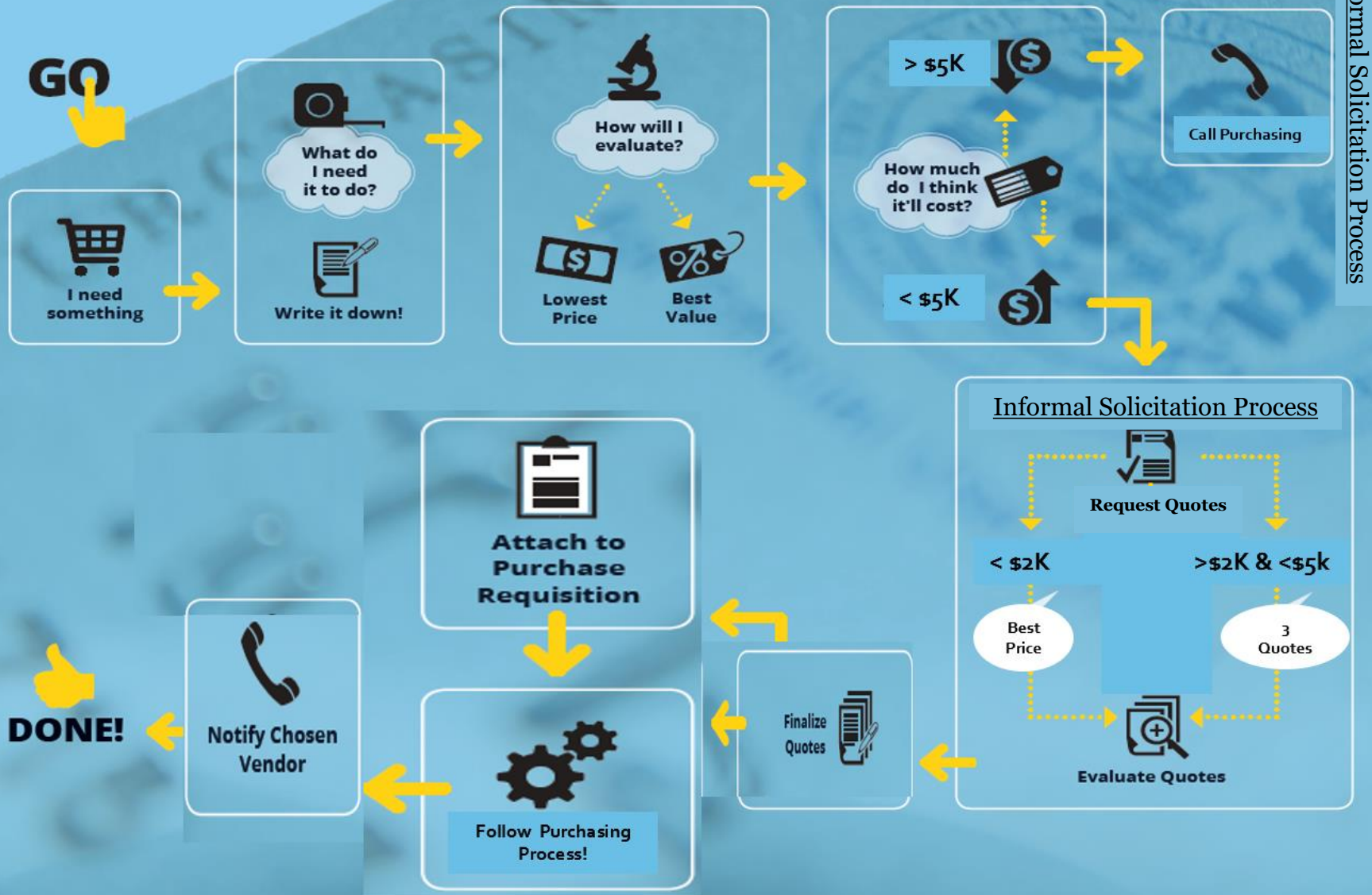
DOLLAR THRESHOLDS

The City of Woonsocket is clear about which procurement solicitation process that must be used based on the purchased dollar thresholds.

<u>Dollar Thresholds</u>	<u>Requirements</u>
Up to \$2,000	Informal Bid Obtain Best Price
\$2,001 up to \$4,999	Informal Bid Obtain 3 Quotes
\$5,000 +	Formal Bid

Please note the City of Woonsocket prohibits the subdividing of bid awards.

PROCUREMENT WORKFLOW CHART



Formal Solicitation Process

Informal Solicitation Process

Request Quotes

< \$2K

> \$2K & < \$5k

Best Price

3 Quotes

Evaluate Quotes

Finalize Quotes

Attach to Purchase Requisition

Follow Purchasing Process!

Notify Chosen Vendor

DONE!

The following chart gives an overview of commonly used procurement processes & methods, when to utilize each one, the pros and cons of each and lead time expectations.

Method	Threshold	Requirements	Pros/Cons	Lead Time
Request for Quote (RFQ)	For any informal procurement < \$5K	Detailed specifications or scope of work.	Allows competition quickly. Only for informal solicitations.	Quickest due to no formal advertising requirements.
Request for Statement of Qualification (RFSQ)	For any formal purchase regardless of amount	Setting criteria which make prospective bidders qualified to provide certain services or to respond to a formal solicitation.	Narrows the pool of firms to only those that are qualified.	Precursory to an ITB or RFP
Request for Information (RFI)	For any formal purchase regardless of amount	Describing a City need but leaves it to the proposer to respond w/information or possible solution.	Allows the City time and possible solutions without commitment. Usually leads to an RFP.	Varies depending on time given to proposers to respond
Invitation to Bid (ITB)	For any formal procurement >\$5K	Detailed specifications or scope of work.	Award is made to the lowest responsive and responsible bidder. Doesn't allow for best value.	Must be open to bidding at least 7 days but no longer than 21 days unless waived.
Request for Proposal (RFP)	For any formal procurement >\$5K	Detailed specifications or scope of work. Determination of scoring criteria. Establishment of an evaluation team.	Best value is determined by an evaluation committee, based on evaluation criteria included in the RFP.	Varies, but usually the lengthiest.

INFORMAL SOLICITATION PROCESS

Informal Solicitation Process – Is used for purchases valued less than \$5,000.

An Informal Solicitation is a procurement process accomplished without an invitation for bid, request for proposal or request for information. It is not subject to formal public notification nor requires city council approval. These are generally solicited via e-mail or telephone, from a minimum of three (3) supplier already on the approved supplier list in E-Finance. The informal process from solicitation to the placement of an order takes between one day to two weeks to complete.

INFORMAL SOLICITATION **PROCESS METHODS**

- ✓ **Request for Quote (RFQ)**
- ✓ **Intergovernmental Procurement**
 - ✓ **Master Pricing Agreement (MPA)**
 - ✓ **Piggybacking**
- ✓ **Emergency Purchases**
- ✓ **City Debit Card Purchases**

REQUEST FOR QUOTE (RFQ)

The RFQ is a straightforward informal solicitation process method that identifies what is needed or requests a proposed solution. These purchases tend to be low in risk to the City and is best suited to products and services that are as standardized and as commoditized as possible, as this will make each supplier's quote comparable.

Departments can move forward with a procurement of goods and/or services < \$5,000 in the following ways:

- 1. Standard RFQ Threshold of \$2K <\$5K.** Based on established thresholds, the City Charter requires an informal, competitive, Request for Quote (RFQ) method to be applied. (3 quotes minimum).
- 2. Master Price Agreement (MPA)/Piggybacking.** Departments should reach out to the Purchasing Department to see if there is an already approved supplier or whether we can piggyback an agreement or utilize a Master Price Agreement (MPA) with the state.
- 3. Price Quotes/Sourcing <\$2K.** The City Charter does not explicitly state that a standard RFQ is required for this threshold. However, it is best practice to “comparison shop” prices with at least two suppliers.

In any of the 3 events, the originating Department must submit an electronic requisition to be approved. Once approved a *purchase order is created, released and submitted back to the requesting Department to send to the supplier.

A purchase order becomes a legally binding contract document upon offer & acceptance.

Some considerations when obtaining quotes:



1. Getting cost estimates for services:

Get the right rate. Many common services that you need may be subject to the City or State's Prevailing Wage. It is critical that this is discussed with the supplier at the time you are requesting estimated hourly rates. It is not uncommon for contractors to walk away from performing work because they were not made aware at the time of estimation that the City had a Prevailing Wage requirement for the project.

2. Quotes are not good indefinitely:

If it's been more than 30 days since you obtained your quote, make a call to your supplier and check on the validity of the pricing. Most organizations will honor a price for 60 days, but for volatile commodities like technology or oil-based products, call and make sure that your pricing is valid before you submit your requisition.

3. A Quote is Not a Contract:

Simply obtaining a quote from a supplier does not commit or obligate the City in any way.

INTERGOVERNMENTAL PURCHASING

The first type of intergovernmental procurement method is the use of a **Master Price Agreement (MPA)**. MPAs are contracts that have been competitively bid through the request for quote or the request for proposal process method by the State of Rhode Island. By using the combined purchasing power of the State or States, it is expected that they should yield the best pricing available.

Master Price Agreements cover requirements for a universal State-wide need for goods or services for a specified contracted period. The MPA establishes a qualified list of firms and sets the terms and conditions for the acquisition of the goods or services covered in the agreement. It also gives the City the ability to bypass the lengthier formal solicitation process and offers the City an opportunity to mini-bid.

The City of Woonsocket cannot use an MPA unless the State of Rhode Island is a participating state to that agreement. If the State of Rhode Island is a participant state to an MPA, then by state law any political subdivision in Rhode Island can also participate in that agreement.

In Rhode Island there are approximately 200 MPAs in the portfolio. The MPAs are diverse in the goods and services that are offered to state agencies. Some examples of active MPAs include:

- Office Supplies
- Small appliance repairs
- Heating Oil, Gas & Diesel Fuels

The full list of state MPAs can be found at:

<https://ridop.ri.gov/ocean-state-procures-osp/contract-board>



PIGGYBACKING

Another form of intergovernmental procurement method, also called a Cooperative Agreement, is when the City participates in a contract that had been prepared, solicited and awarded to another local, state or federal government agency (called the Host Agency).

The **major difference** between the piggyback and the MPA methods is that there is no condition that R.I. must be a participant state to the agreement, like the MPA, for the City to participate in the contract. In fact, any public entity is allowed participation in a piggyback agreement.

However, the agreement must specify that Piggybacking is allowed, a notification sent to the host agency and/or supplier of the intent to piggyback, and a written consent that the piggyback is approved.

Conditions of Piggybacking

- 1) **Subject Matter Comparison**: There should be an equivalency between the requirements sought by the City and the original contract;
- 2) **Scope Comparison**: The new size and scope requirements should not significantly alter the original contract;
- 3) **Documentation**: The City's bid folder must contain supporting documentation that verifies the host agency had met its statutory competitive bidding requirements;
- 4) **Notice to the Host Agency**: The original contracting entity should be contacted and advised of the intended piggyback;
- 5) **Consent of the Supplier**: The supplier's consent to the piggyback request must be in written legal form (contract, letter agreement, etc.); and
- 6) **Timeframe**: Once the lead agency's contract expires, no new work should be initiated by the piggybacking agency.

EMERGENCY PURCHASES

An emergency condition can result in an immediate and serious need for materials, services, or construction that **cannot** be met through a Formal Solicitation process, and which seriously threatens the functioning of the City, the protection of property or the health and safety of any person.

Emergency purchases may be made in accordance with R.I. General Laws Title 45, Chapter 55, Section 8b, with a written determination, when there arises a critical, unforeseen need and the City's ability to serve the public would be impaired if purchases are not made immediately.



In the event of an emergency purchase, the initiating Department should do the following:

- ✓ Contact Purchasing on the next regular business day with the following information in memo form:
 - Date of the emergency event;
 - Action taken by an organization to assist City in handling the emergency event;
 - Acknowledgment of the unusual procurement process/arrangement and site acknowledgment; and
 - Total cost of goods and/or services provided.
- ✓ Provide a copy of that memo, signed by the Department Director, to the Purchasing Agent. Be sure to attach any resulting requisitions or vouchers created in handling payments to the supplier.

CITY DEBIT CARD (P-CARDS)

Purchases using the City's debit card should only be used when all other payment options have been exhausted. To make a purchase using the City debit card, a written request is required. That request should include any supplier information you have, the item being purchased, the quantity, the estimated dollar amount and the charge account number. If this is a web purchase a weblink should accompany the request. The required information should be sent to the Purchasing Agent via email for processing.

SOLE SOURCE vs SINGLE SOURCE

NOTE: The only methods allowed by the City to bypass the formal solicitation process requirement is with a bona fide sole source or an approved emergency purchase.

Sole Source

This is when one, and **only one** supplier, to the best of the requester's knowledge and belief, based upon thorough research, can provide the required product or service.

Single Source

This is when there are more than one supplier that can provide the required product or service, but a conscious decision by the City was made to use only one of those sources exclusively.

Some **Legitimate** reasons why the City can only do business with a sole source:

1. Continuation of work on a project;
2. Existing systems in place and compatibility issues;
3. Exclusive supplier and distributor relationships;
4. Large investment in a legacy system; and
5. Operational impact due to system or product transition.

Sole Source Key Points

- ❖ A sole source purchase is a method of acquisition and **not to be used** to avoid competition.
- ❖ Sole Source purchase requests must be justified in writing to as to why competitive procurement is not needed and why the good or service being procured is the only suitable one of its kind.
- ❖ Sole sources should always be backed up with a long-term contract to mitigate risk, protecting the City's interest.

Some **invalid** justifications for using a sole source:

1. ***Poor planning – “We didn’t have time to go out to bid.”;***
2. ***Preference – “We like the current supplier and do not want to switch”; or***
3. ***Past Practices – “Purchasing approved this two years ago, why can’t they approve it now?”***

Request for a Sole Sources with an invalid justification will not be approved.

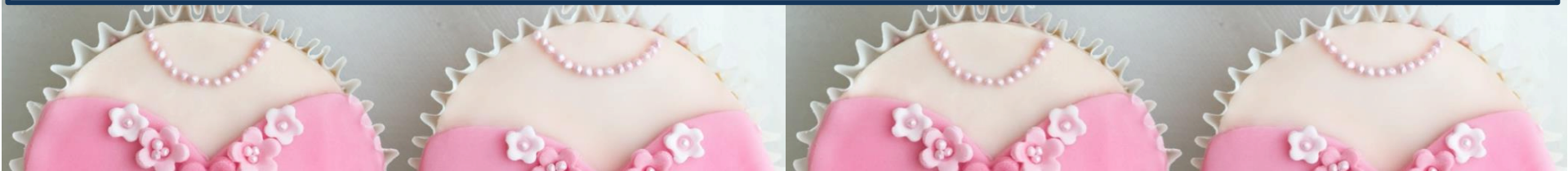
FORMAL SOLICITATION PROCESS



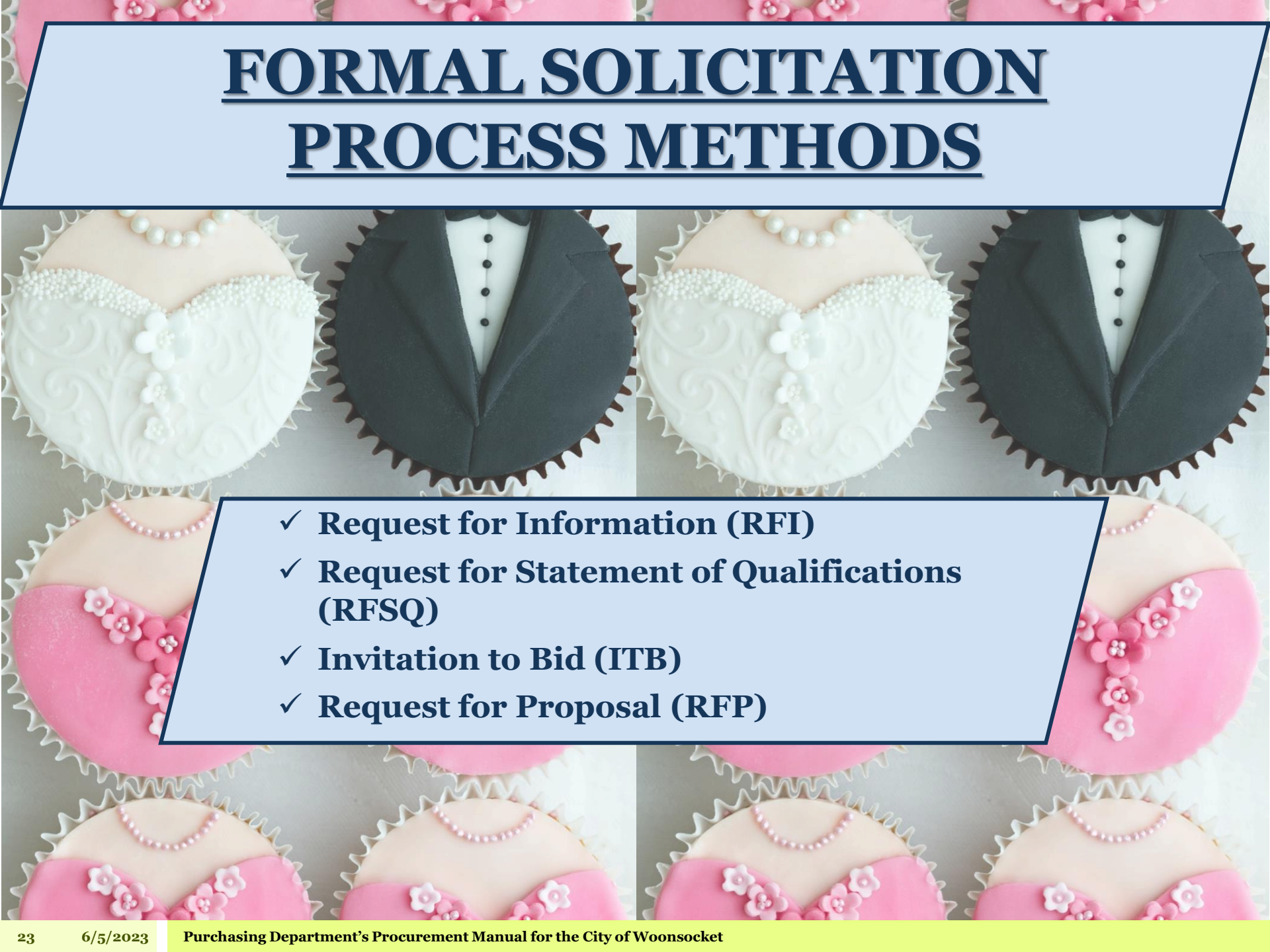
Formal Solicitation Process – Is required for purchases greater than \$5,000.

The formal solicitation process is designed to ensure fair and open competition in public procurement. It eliminates the ability of an entity influencing the bidding and evaluation process.

The formal process includes a public solicitation posted in the local newspaper and on the City's website in the "Bid Opportunities" section. Submissions are delivered in sealed envelopes and opened at a predetermined time and place. Once opened, the bids are made public, evaluated, an award recommendation is made, routed for final approval then an award notification is sent to the winning firm. The formal process from solicitation to award notification may take up to 180 days to conclude depending on the method used.



FORMAL SOLICITATION **PROCESS METHODS**

- 
- ✓ **Request for Information (RFI)**
 - ✓ **Request for Statement of Qualifications (RFSQ)**
 - ✓ **Invitation to Bid (ITB)**
 - ✓ **Request for Proposal (RFP)**

REQUEST FOR INFORMATION (RFI)

A **request for information (RFI)** is a formal solicitation process method. It is non-binding in nature, and it requests input from interested parties for a future solicitation. Departments using an RFI can obtain feedback, comments, or reactions from the potential supplier community. RFIs typically do not involve pricing but acts as a focus group that allows Departments to gain critical information and insight prior to issuing a formal ITB or RFP solicitation.

What it is:

- **IT IS** an educational tool/fact-finding mission.
- **IT IS** useful in project timeline estimating.
- **IT IS** information to assist in the development of an RFQ, ITB or RFP at a later date.
- **IT WILL** provide various solutions to a challenge.
- **IT WILL** yield a shortlist of viable firms.
- **IT IS** a method used to create supplier profiles for inclusion in future projects or solicitations.
- **IT IS** a method that will yield a large data pool in a short period of time.

What it is not:

- **IS NOT** an Invitation to Bid or a Request for Proposal.
- **IS NOT** an award-based method.
- **IS NOT** used to pre-select suppliers.
- **IS NOT** a signal or a commitment to buy.
- **IS NOT** a guaranteed of a future solicitation.

Best RFIs Include:

1. **Product Description, Goals, and Background;**
2. **City Information;**
3. **Supplier Requirements;**
4. **Submission Instructions; and**
5. **Requested Information**



REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ)

A **Request for Statement of Qualifications (RFSQ)** is a qualification-based selection method. Just like the RFI, this method is also **NOT** a bid. It is a request for firms to submit their qualifications to be considered for a project.

The RFSQ document contains background information and context about the project need or problem to be solved and questions for firms to respond. Those questions typically focus on potential firms' very specific subject knowledge, experience, reputation and customer satisfaction.

RFSQ - Two Phase Approach:

Phase 1: The RFSQ is issued, soliciting, information from suppliers. The subsequent responses to the requested information is referred to as a **Statement of Qualifications (SOQ)**. The Department will evaluate the SOQs and determines which firms are the most highly qualified to successfully deliver the project.

Phase 2: Once the Department has short-listed the most highly qualified firms that submitted an SOQ in Phase 1, the Department will then issue either an RFQ, ITB or an RFP, depending on the dollar threshold, to those firms. Only these firms will be eligible to submit a proposal for the project. The Department, in its sole discretion, will then award the contract for the project to that firm who offers the lowest responsive, responsible proposal.

****NOTE: There are 2 solicitation methods which universally use the same acronym. The formal Request for Qualifications (RFQ) and the informal Request for Quote (RFQ).***

-To avoid confusion, the City will refer to the former Request for Qualifications as the Request for Statement of Qualifications (RFSQ).

-While these two documents are often issued and responded to interchangeably, they serve very different purposes and are almost total opposites.

INVITATION TO BID (ITB)

Invitations to Bid are project centered and very specific. Meaning the Department has a specific project in mind, and know exactly what products or services they need, how much they want and when and where they want it delivered. The project is already planned and documented with detailed specifications, scope of work, requirements, service and warranties. With no substantial differences between varying products, the only thing missing, and the most important component of the ITB evaluation, is the price.

Therefore, ITBs are also price-focused and competitive. Price is key and is the most important aspect of an ITB. The award is generally given to the firm who submits the most responsive, responsible, lowest bid.

An invitation to bid will almost always results in a fixed price contract.

The steps used in the ITB method include:

- 1. ITB document is prepared** collaboratively between Departments.
- 2. Purchasing will review & advertise** the ITB on the City's website and with the local newspaper.
- 3. Sealed bids are received** by the City opened and reviewed for responsiveness and completeness.
- 4. Purchasing tabulates & publishes the ITB results** and forwards it on for review.
- 5. Recommendation for award is made, routed for approval and sent back** to the Purchasing Department. (Steps 4 & 5 are referred to by the City as **"UNDER REVIEW"**)
- 6. Contract is awarded and fully executed** if within delegated authority, otherwise City Council approval is required prior to award and execution.

INVITATION TO BID

FAQ



Why are bids sealed?

Bids are sealed to ensure that there has been no unauthorized parties handling the bids or viewing submissions prior to the deadline date and time. Also, it is to protect any confidential information being provided by the bidders with their submission.

Can a bid be canceled?

A bid can be canceled at any time up to the bid opening has taken place. The City Charter allows the City to reject all bids and resolicit at any time. However, careful consideration should be taken before canceling a bid. In the event the City determines a bid should be canceled, all unopened bids should be returned to the respective bidders.

Can Purchasing provide samples of ITBs to help create specifications?

Yes, Purchasing has access to a library of bids solicited by other agencies across the country.

What if a firm contacts me for information on an ITB I've been working on?

Refer them to the Purchasing Agent. The Purchasing Agent should be the single point of contact for all interested bidders once you start working on a bid. It protects Department staff from having to worry about conflicts of interest. It also keeps bidders from inadvertently disqualifying themselves from the process.

What happens in the event of a bid that receives two separate, but identical final bid amounts?

If the City receives two bids with identical final amounts, the City may choose between either bidder.

Do we need a pre-bid meeting?

A pre-bid meeting is not always required. However, it is a great way to get all prospective bidders in one place at the same time to personally deliver critical information regarding specifications, City requirements, etc. If a pre-bid meeting is mandatory, all bidders who submit a bid must have been in attendance to be considered responsive.

What does it mean to be responsive?

To be responsive, a bid must comply in all material aspects with the requirements set forth in the ITB/RFP. These requirements are put into place to ensure that all bidders have equal “standards” to meet and therefore can be compared equally. If a bidder, for example, is required to provide certain licenses or sureties in order to be considered for a project and they do not provide that prior to the time of the bid opening – they could be deemed non-responsive.

Why are bid openings public?

The history of public bid opening has been an effort to make public procurement as transparent as possible. The idea that any bid could be examined by interested parties was meant to demonstrate that the process was fair and equitable for all.

REQUEST FOR PROPOSAL (RFP)

A Request for Proposal is a method used for larger, more complex projects that need some modification or development work. The RFP will outline the Department's requirements and all the significant factors that will be taken into consideration during the scoring and evaluation phase. The Department may even invite prospective firms to a pre-bid conference to gather more information.

After initial bids are submitted and opened, the evaluation team conducts a prequalification round based on the scoring criteria in the RFP and some firms are thus eliminated. The remaining qualified firms are invited for a round of demonstrations and/or interviews which may lead to further negotiations on pricing and finalize technical details. The final bidders are then allowed to submit a Best and Final Offer (BAFO) before the contract is ultimately awarded.

An RFP, in general, takes more time to complete because of the evaluation component.

The steps used in the RFP method include:

- 1. RFP document is prepared** collaboratively between Depts.
- 2. The evaluation team develops the RFP Scoring criteria.**
- 3. Purchasing will review & advertise** the RFP on the City's website and with local newspaper.
- 4. Sealed proposals are received** by the City opened and reviewed for responsiveness.
- 5. Purchasing hands over** all proposals to the evaluation panel.
- 6. Department Director schedules scoring meeting** with the evaluation panel and some firms are eliminated.
- 7. Rounds of Interviews and/or Demonstrations** are scheduled with the top scoring firms.
- 8. Negotiations on price and technical detail, then firms are allowed to submit Best and Final Offers.**
- 9. Recommendation for award is made, routed for approval** and sent back to the Purchasing Department.
- 10. Contract is awarded and fully executed** if within delegated authority, otherwise City Council approval is req'd.

RFP SCORING CRITERIA

Request for proposal (RFP) scoring criteria is a set of standards that guide the scoring of firms' proposals. When put into practice, your RFP evaluation criteria standardizes scoring and removes subjectivity from the process. The criteria is used to evaluate proposals and select which firms that will move forward in the RFP process.

RFP - Scoring Criteria Can Be:

1. Mandatory (Must Haves)

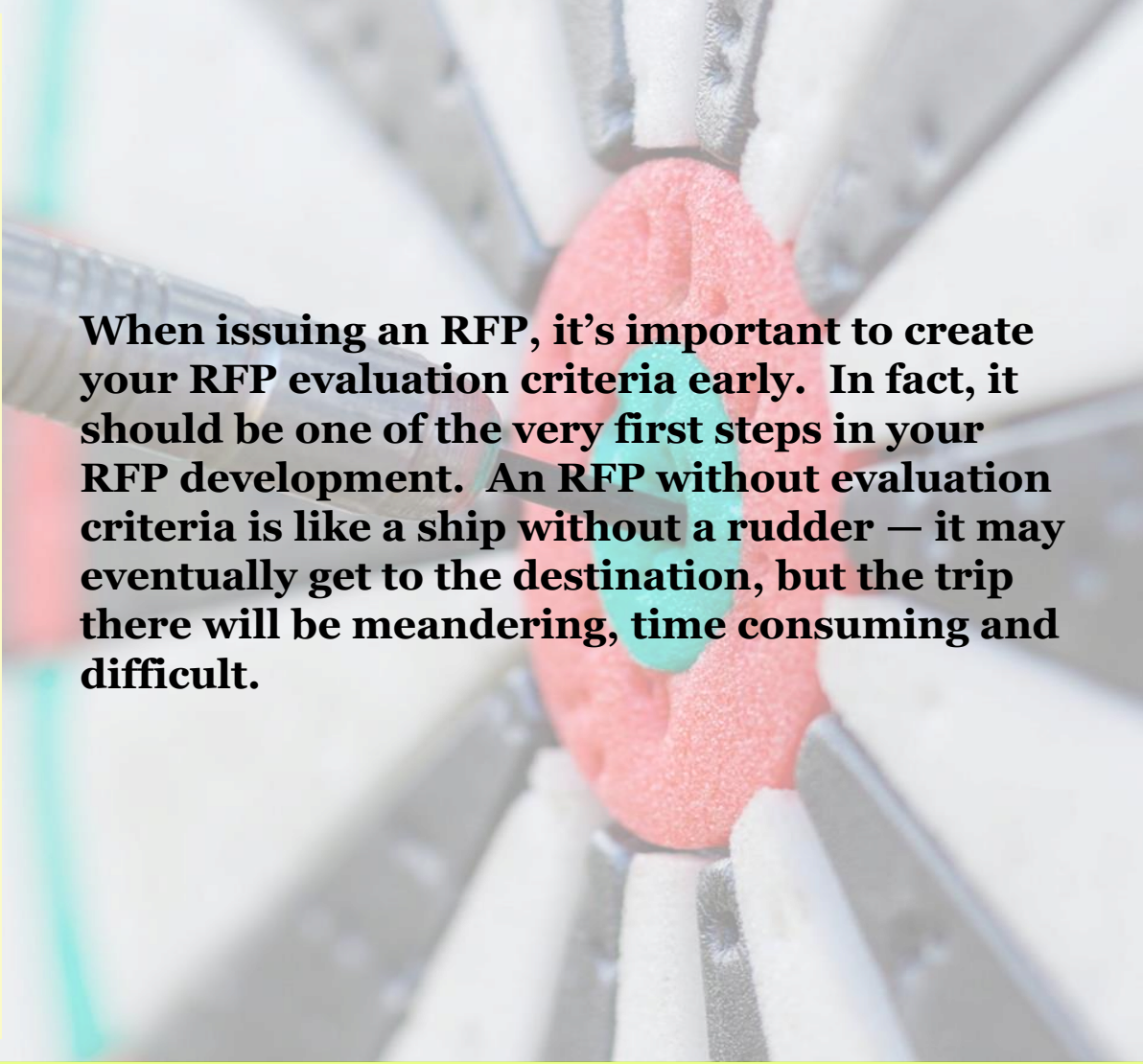
These are straight forward **pass/fail**. The first criteria against which RFPs are evaluated in order to eliminate ones that do not conform to these requirements.

2. Weighted

This can be measured in terms of degree of responsiveness. The scale used to measure the degree of responsiveness depends on the nature and the scope of the intended procurement.

3. Weighted w/Mandatory Elements

Are criteria that have mandatory minimum requirements defined and are measured above that minimum requirement. (Example: a requirement may be set for a consultant to be fluent in at least two international languages and a rated score may be assigned for persons with additional international language capabilities, if the additional language adds value to the requirement.



When issuing an RFP, it's important to create your RFP evaluation criteria early. In fact, it should be one of the very first steps in your RFP development. An RFP without evaluation criteria is like a ship without a rudder — it may eventually get to the destination, but the trip there will be meandering, time consuming and difficult.

RFP SCORING EXAMPLES

Unless you see it in action, RFP evaluation scoring criteria is hard to picture. So, the best way to understand it is to see it in practice. Below are examples of how evaluation scoring criteria can appear in an RFP:

SIMPLE MATRIX

	Points
OVERALL EXPERIENCE OF COMPANY & DEMONSTRATED RESULTS Our evaluation will include an assessment of the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references, and related items.	35
STRATEGIC THINKING/PLANNING APPROACH Overall approach and strategy described/outlined in the proposal and firm capacity to perform the engagement within the specified timeframe (prior experience of the firm in meeting timelines will be factored in here)	40
BUDGET APPROACH/COST EFFECTIVENESS Effective and efficient delivery of quality services is demonstrated in relation to the budget allocation. The allocation is reasonable and appropriate.	25
Total	100
MBE/WBE/DisBE Participation (additional potential points)	6 pts

MULTI-FACTOR MATRIX

Rounds 1 and 2	
Minimum Qualifications	Pass/Fail
Mandatory Technical Requirements	Pass/Fail
Round 3	Maximum points
Pricing Proposal	100
*Management Proposal	450
*Technical Response/Requirements	350
Inclusion Plan	100
Round 3 Total	1000
Round 4	Maximum points
Final Cost	200
Demonstrations	250
Management Interview	250
References	300
Round 4 Total	1000

Best Practices for RFP Scoring Criteria

- ✓ Be as transparent and upfront as possible;
- ✓ Don't deviate from your scoring criteria;
- ✓ Engage individual stakeholders;
- ✓ Keep contributors focused; and
- ✓ Discuss discrepancies.

LEAD TIME FOR A COMPLEX RFP PROJECT

TASK	SUGGESTED LEAD TIME	EXAMPLE
Proposal Initiation	-----	February 1
Begin Preparation of Specifications and Contract.	30 Days	March 1
Final Approval of Specifications.	30 Days	April 1
Advertise and Issue Solicitations (RFP).	30 Days	May 1
Receipt of Responses	30 Days	June 1
Evaluation of Responses	5 – 30 Days	July 1
Contract Negotiations	30 Days	August 1
City Council Approval	10 Days	August 10
Contract Execution - City	3 – 10 Days	August 20
Contract Execution / Bonding	Minimum 10 Days	August 30
Contract Begins	-----	September 1

REQUEST FOR PROPOSAL

FAQ



I have a good relationship with a supplier, can they assist us in scope development?

Yes, they can, so long as they understand that by assisting in scope or specifications development that they are precluded from submitting a proposal.

How many people should be on my evaluation panel?

An odd number is best, and it depends on how many stakeholders are affected by the resulting contract. The Department Director should take the lead on all evaluation panel meetings and demonstrations. However, keep in mind that Purchasing Agent may be there, but would only be there to advise and guide, not as an evaluator.

Our RFP is very unusual, and I don't know where to start on my specifications. What can I do?

Call Purchasing. We can research similar RFPs and get some samples over to you that may provide inspiration or give you the kickstart you need.

We have a consultant on our project team, may they score on our panel?

Generally, it is best practice to keep the evaluation panel limited to City staff. However, your consultant can take the role as a non-scoring advisor and provide insight on issues that arise that are technical in nature or specific to scope.

Is there a cone of silence for an RFP?

Yes, the RFP method is protected by the same cone of silence as all other formal solicitations. The intent is to always protect the integrity of the procurement process. If prospective proposers reach out to City staff, please notify Purchasing so we can remind all proposers of the rules of engagement.

Why does the RFP take so long?

RFPs are usually complex procurements that take more time to develop. With a complex request, prospective bidders need more time to develop their response to the City.

The RFP also has an evaluation component that other methods do not. The time needed to score & evaluate each proposal can take weeks

The best piece of advice is to plan ahead.

The Bid Protest

Means a protest, complaint or challenge by an aggrieved actual or prospective bidder in connection with the solicitation or selection for award of a contract.

A protest must be received by the Purchasing Agent and will be responded to in accordance with the following Rhode Island Code of Regulations:

Section 220-RICR-30-00-1.6 “Resolution of Protests.”

INVITATION TO BID v. REQUEST FOR PROPOSAL

The chart below is a comparison of ITBs and RFPs pre & post awards.

INVITATION TO BID (ITB)	REQUEST FOR PROPOSAL (RFP)
Competitive Sealed Bid Process.	Competitive Sealed Proposal Process.
PRE-AWARD	
<p>No change in bids once they have been opened except for corrections of errors in limited circumstances.</p> <p>Judgmental factors/discretion may only be used to determine if supply, service or construction item meets purchasing description.</p>	<p>Discussions permitted after proposals have been opened to allow for clarification and changes, if steps are taken to treat each proposer fairly, and to ensure that trade sensitive information in each is not revealed to competitors.</p> <p>Judgmental factors are based on the scoring criteria evaluations set forth in the RFP. Some firms are eliminated, and the most qualified firms will continue the process with further interviews and negotiations. Best and final offers are submitted.</p>
POST AWARD	
<p>Once judgmental evaluation is completed, the award is made on a purely objective basis to the lowest responsive and responsible bidder.</p> <p>Price is the basis for the contract award.</p>	<p>Once judgmental evaluation is completed, the award is given to the firm whose proposal best meets the specifications and requirements of the RFP and is most advantageous to the City.</p>

COMMUNICATIONS with BIDDERS

Unfair Advantages

Fairness and transparency are the cornerstones of public procurement.

During an open solicitation, a term called the “**Cone of Silence**” is often used to describe the time period which begins with the solicitation being advertised up to the bid opening date.

The cone of silence is meant to safeguard any information that could provide an unfair advantage to a prospective bidder. The cone of silence means that **no communication** is undertaken with any bidders **in any form**.

The Purchasing Department will always ask to control communication once a solicitation has gone public to ensure that there is no appearance of impropriety or unfair advantages being created.

Communications with Bidders

During the cone of silence period, actual and prospective bidders are discouraged from contacting any City official, other than the Purchasing Agent, regarding any active solicitation.

Permissible can be questions submitted in writing. However, no deviations, additions or further clarifications are permitted.

All responses must be published in the form of an addendum and available to all potential bidders at the same time.

Note: Any contact with City staff other than with the Purchasing Agent may result in the rejection or disqualification of the violator’s bid or proposal.

Only the following types of communication are permitted during the cone of silence period:

- ✓ Actual formal responses, in the form of a sealed bid, to an ITB, RFP or other solicitation;
- ✓ Communications publicly made during the official pre-bid/proposal conference;
- ✓ Written requests for clarification during the question/answer period; and
- ✓ Communication that is verbatim to already publicly published information. (i.e. a verification of the bid opening date to an active solicitation).

BID INFORMALITIES & IRREGULARITIES

REJECTION OR INCLUSION CONSIDERATIONS:

- Is the bidder an SLBE or MBE?
- Past performance on contracts with the City or other public agencies. Reference checks are performed and if information is provided to the City that is cause for alarm, or doubt of the capability of a bidder to perform, a justification can be issued to the Purchasing Agent that the award should be made alternatively to the next lowest bidder.

INFORMALITIES AND IRREGULARITIES

When the Purchasing Agent evaluates a bid, he/she checks for defects (errors or omissions) that are material and substantive. In many cases, defects that are immaterial can be waived at the discretion of the City.

Defects that are immaterial are those that do not affect overall pricing (as submitted in the ITB/RFP), quality, quantity or delivery. It is within the authority of the City to allow corrections to a bidder for clarification so long as all bidders are treated equally.

EXAMPLES OF MINOR IRREGULARITIES

- Failure to include the number of copies of the ITP/RFP packet;
- Failure to submit all forms indicated in the ITB/RFP packet as required; or
- Bidders use an alternative unit of measurement in price calculation.

On the other hand, there are reasons why a bid can be deemed non-responsive, and the bid submission rejected for substantive reasons.

EXAMPLES OF MAJOR DEFECTS OR IRREGULARITIES

- Bidder submits their bid packet after the advertised due date;
- Bidder does not sign their bid submission; or
- Bidder does not have proof of required licensure or bonding as mandated in the bid.

CONTRACTOR BOND REQUIREMENTS

On public projects, there are 3 types of contractor bonds. These bonds are required on projects over a certain threshold dollar amount.

BID BOND:

Often this requirement is submitted with the bid. The bid bond guarantees that the contractor will perform the contract as bid (if selected). If the contractor backs out of the contract they are awarded, the City can initiate a claim against the bond.

PAYMENT BOND:

This bond guarantees that a contractor will pay the labor, material and subcontractor costs on the project. The amount of money needing to be posted depends on the project type and location. Subcontractors or suppliers will be able to make a claim against the payment bond if they go unpaid.

PERFORMANCE BOND:

This bond guarantees the City that the contractor will perform all of its contractual duties in accordance with the plans and specifications. If the contractor is unable to fulfill their duties, the surety will step in to pay for the obligation of the contractor. This often requires bringing in another contractor to see the project through to completion.

PREVAILING WAGES:

These laws require that workers on government projects are paid at about the same rate as those performing similar work on non-government jobs. The prevailing wage laws prohibit contractors and subs from undercutting local workers.

AWARDING OF THE CONTRACT

A contract is a legally binding agreement between two parties that creates an obligation to perform (or not perform) a particular duty.

In the informal solicitation process, the resulting contract is the approved Purchase Order (P.O.) provided to a supplier.

In the formal solicitation process, the Department's specifications and City's general contract terms and provisions, regardless of the process method used, are the principal guiding documents of the contract.

A contract is only considered fully executed when both authorized parties have signed the contract or if there has been an offer and acceptance solidified by the actions of both parties. The contract would now be effective and enforceable

CONTRACT TERMS, DURATION & OPTIONS

Each solicitation – be it formal or informal – is backed by the City’s General Contract Terms and Provisions. This covers the obligations for all organizations doing business with the City. It also points the supplier to pertinent sections of the contract which cover insurance, payment and termination for cause and convenience. The General Contract Terms and Provisions obligates organizations to comply with all applicable laws and regulations.

Contract terms may be negotiable to a certain extent. These negotiations should always be handled by a representative from the Purchasing Department with support from the Finance Director and the City Solicitor.

Contracts, per the City’s Charter, cannot be for a duration longer than one (1) year, or valued greater than \$100,000, without seeking approval (via ordinance) from the City Council. Contracts can be formulated to have optional renewal periods on an annual basis or to run consecutively for several years with final option renewal years at the end of the agreement. The decision is for the requesting Department to determine what makes the most sense for them and their Department’s needs.

Although an existing option for renewal may exist, the City has no obligation to exercise the option. Contract performance monitoring should be an ongoing activity for the Department and unsatisfactory performance should be reported to the Purchasing Department. If the Department has the need to terminate a contract before its termination date, the Purchasing Department and the City Solicitor can assist.

Contract Amounts and Required Approvals

The Finance Director and the Mayor can authorize the approval to execute an agreement with a total value less than \$100,000 (over the life of the contract), or for a duration not exceeding one year, without having to seek the approval of the City Council.

However, If the estimated value exceeds \$100,000, or the duration will be greater than one year, City Council must approve the agreement through Ordinance prior to the execution of the agreement. In this instance, time should be factored into the work plan to allow for this additional requirement including time to get it on the City Council's docket.

A successful contract is contingent on a few things:

- ✓ **A willing partnership by all participating parties;**
- ✓ **A clear understanding of everyone’s roles and goals;**
- ✓ **A party monitoring and reporting on performance;**
and
- ✓ **A clear path for remediating issues – if needed.**

Contract Administration and Compliance

Contract administration and monitoring is the responsibility of the contracting Department. Quarterly reports regarding contract administration and contract compliance on behalf of the City should be provided to the Purchasing Department.

EVALUATION, CURING, SUSPENSION & DEBARMENT

Evaluation/Curing

Regular evaluation of a contracted partner is critical to the life-long success of the contract. Evaluations are an opportunity to capture performance deficiencies as well as tracking how well a supplier is performing. In the event that issues are tracked and need to be corrected, the information memorialized in the evaluations make corrective action discussions with the supplier easier and more accurate. Having hard facts also takes the emotion out of the conversation so that the focus can be on correcting performance and getting both parties back on solid terms.

Most times, organizations are anxious to correct issues and willing to do their part to make things right. Resistance to correcting performance can be met and that is where the City has options per its General Contract Terms and Provisions.

Working with the Finance Director and the City Solicitor, the Purchasing Department will draft a cure letter to organizations that have difficulty addressing performance or other contract issues (insurance, for example). The cure letter will point out all areas of concern and provide a deadline to the organization by which their issues should be addressed and cured – otherwise the City may opt to suspend or cancel the contract, and/or may pursue other actions against them.

Suspension

Suspension of a contracted supplier means that they will not be allowed to perform under their contract terms with the City until further notice. Suspension of services, for example, would mean that the Department would then rely on an alternative providers until the suspended contractor has addressed the corrective action and can resume services. In those events, the Purchasing Department will work with client Departments to ensure that there is planned coverage.

Suspension Pending Debarment

Debarment is the most severe penalty that can be given to a contracting firm, or individual, doing business with the City.

Debarment is exclusion from opportunities to secure contracts funded by taxpayer dollars. Debarment, whether it is imposed for a few years or permanently, is damaging and its aftereffects are often permanent.

The Purchasing Department is dedicated to ensuring that the City gets the best value for City Departments to accomplish their critical missions and to assist in all aspects of the procurement cycle.

Possible grounds for debarment include:

- Bid rigging; embezzlement; theft; falsification of records; collusion; or
- Any offense indicating a lack of business integrity or business honesty; or
- Commission of a criminal offense arising out of obtaining a public or private contract; or
- City has issued the bidder/contractor two or more unsatisfactory performance evaluations in any three-year period; or
- Failure to pay prevailing wages; or
- Violation of a local, state or federal law or regulation applicable to a contract; or
- A willful breach of a material term of a contract.

PROJECT CLOSEOUT

Closing out a project can be a stressful time when working on City construction contracts. While most of the work may be complete, scrambling to button up the punch list and to make sure everyone's paid is the source of many headaches.

Inspection & Acceptance

Before the project can be considered complete, the City will do an inspection walk through to verify that the work has been completed according to the contract specifications.

Once approved, the project will reach final acceptance.

The End.

According to the “FARs Inspection of Construction” clause:

“Acceptance shall be final and conclusive except for latent defects, fraud, gross mistakes amounting to fraud, or the government’s right under any warranty or guarantee.”

THE CENTRAL STORE

The Central Store is managed by the Purchasing Department and responsible for the following support functions for City Departments:

- ✓ Carrying core supply items frequently used by Departments;
- ✓ Maintain and monitor min/max levels;
- ✓ Conduct regular cycle counts or full inventories;
- ✓ Ensure proper and timely transactions;
- ✓ Supports a Zero Waste initiative by providing an opportunity for City staff to repurpose surplus office supplies and furniture.

MEMO

To purchase a non-stock item:

1. Pick from an approved supplier.
2. Provide a written request to Purchasing that includes:
 - a. A weblink (**preferred**)
 - b. Item(s) to buy
 - c. Quantity
 - d. Cost
 - e. Charge Account





IN CONCLUSION:

Every procurement is unique. They are based on your Department's needs and circumstances at that moment in time.

When your requirements present unique circumstances, this manual is your guide to providing the best options for clear pathways to successfully navigate the procurement processes and those methods used.

The Purchasing Department's goal is to continuously improve these models and to incorporate best practices in procurement and contract management as they occur.

Let this manual be the foundation to spark those conversations that will lead to your successful procurements.

GLOSSARY OF TERMS

TERM	DEFINITION
Addendum	An item of additional material added to a document, typically in order to correct, clarify, or supplement something.
Bid Protest	a protest, complaint or challenge by an aggrieved actual or prospective bidder or offeror in connection with the solicitation or selection for award of a contract.
Bid Rigging	It is an agreement among competitors as to who will be the winning bidder.
Bid Splitting	Is the intentional dividing of orders for supplies and equipment into smaller quantities in order to avoid the statutory threshold.
Central Store	Provides core stationery material, hardware items and other type of goods/items to other Departments.
City Charter	Is a City in which the governing system is defined by the City's own charter document rather than solely by general law.
Closed Bid	Means that the bid is no longer active, under review nor has been awarded. This could be anything from a project is no longer considered viable to the City, bids exceeded the availability of funds for the project or specifications needed to be revisited.
Code of Ethics	Sets forth values, ethical principles, and ethical standards to which professionals aspire and by which their actions can be judged.
Cone of Silence	Prohibits any communication regarding a particular RFP or ITB after they have been advertised.
Conflict of Interest	A situation in which a person is in a position to derive personal benefit from actions or decisions made in their official capacity with the City.
Contract	Is an agreement between parties, creating mutual obligations that are enforceable by law.
Contract Administration	Is the planning and execution of contracts. It involves oversight of contract lifecycle management and the tracking of counterparties, terms and conditions and financials.
Contract Compliance	Refers to observance of the norms and procedures outlined in a contract. Often, this involves periodic reviews of an existing contract to determine adherence to compliance mandates and protocols and check for deviations.

GLOSSARY OF TERMS

TERM	DEFINITION
Contract Curing	Means to correct or remove a defect that would be considered a breach by the curing party.
Debarment	A final action taken to exclude a party from eligibility for new procurement and non-procurement awards.
Decentralization	The transfer of control of an activity or organization to several Departments or authorities rather than one single one.
Emergency Purchases	Is caused by the need to satisfy a requirement that cannot be satisfied through normal procurement channel.
Ethical Statement	Paragraph that gives a picture of your core values and what potential supervisors, colleagues, or clients can expect from working with you.
Evaluation Panel	To assess the proposals received and identify the one that best meets the needs of the organization through an objective assessment.
Formal Solicitation Process	Is the required process to publicly issue written requests for quotes or proposals with a purchase value greater than \$5,000.
Informal Solicitation Process	Is the process to obtain information, a firm's qualifications, or solicit request for quotes with a value less than \$5,000, without the need for an Invitation to Bid.
Informalities/Irregularities (Major)	Is one that has an important effect on the terms of the ITB or RFP (i.e. unsigned proposal or inclusion of a bid bond) is required to be rejected.
Informalities/Irregularities (Minor)	Is one that is merely a matter of form and not of substance (i.e. # of copies submitted) may be waived.
Invitation to Bid	Is the formal solicitation process method by which the City uses to solicit bids with an expected purchase value to be greater than \$5,000.
Mandatory Criteria	Are used in straightforward Request for Proposal (RFP) where bidders are rated as pass/fail, responsive/non-responsive or comply/non-comply.

GLOSSARY OF TERMS

TERM	DEFINITION
Mission Statement	A paragraph that outlines purchasing's purpose, goals, and values. It serves as a guide for decision-making and helps to keep the Department on track.
P-Card/Credit Card	Or Credit Card that allows Departments to take advantage of the existing credit card infrastructure to make electronic payments for a variety of expenses. Should only be used when all other payment options have been exhausted.
Prevailing Wages	The average wage paid to similarly employed workers in a specific occupation in the area of intended employment.
Price Fixing	An agreement among competitors to raise, fix, or otherwise maintain the price at which their goods or services are sold.
Procurement	Is the process of purchasing goods or services and is usually in reference to spending.
Purchasing Agent	Is the City's authorized agent who oversees the transactions for procuring and/or contracting goods and services is also responsible for disposition of City property or assets that are not real estate related.
Request for Statement of Qualifications	Narrows the pool of suppliers, wherein the respondents are evaluated based solely on their qualifications. Usually leads to an ITB or an RFP.
Request for Information	A signal that the government body is probably in the market for a solution but won't be buying imminently. After reading the responses to an RFI, the contracting authority will be better informed about the available solutions to its business problem and the competing firms who can help them. They'll also have a good idea of which organizations have the most insight or market knowledge in this area.
Request for Proposal	A method used in the formal solicitation process when factors other than price are to be considered or when objective criteria cannot be defined. One of the key differences between an ITB and an RFP is that negotiations are allowed in an RFP. Discussions are allowed with the respondents and best and final offers are solicited.
Request for Quote	An informal solicitation process method for the purchase of goods or services valued less than \$5K.
RICR	Rhode Island Code of Regulations.

GLOSSARY OF TERMS

TERM	DEFINITION
RIGL	Rhode Island General Laws
Scope	A way to set boundaries on your project and define exactly what goals, deadlines, and project deliverables you'll be working towards.
Scoring Criteria	Are the standards against which RFPs are evaluated. Generally, evaluation criteria can be categorized into three categories including (i) mandatory criteria, (ii) weighted criteria and (iii) weighted criteria with mandatory elements.
Single Source	One in which two or more suppliers can supply the commodity, technology and /or perform the services required by an agency, but the Department selects one supplier over the others.
Sole source	One in which only one supplier can provide the commodity, technology and/or perform the services required.
Statement of Work	A document that provides a description of a given project's requirements. It defines the scope of work being provided, project deliverables, timelines, work location, and payment terms and conditions.
Supplier	A person or organization that provides something needed such as a product or service.
Transparency	Is a core principle of high-quality public procurement. An open and transparent procurement process improves competition, increases efficiency and reduces the threat of unfairness or corruption.
Under Review	This stage begins with summarizing all of the bids after they are publicly opened, then are compared and evaluated, a recommendation is made, routed for approval and concludes with an award notification.
Vision Statement	A paragraph that describes purchasing's long-term goals. It's ambitious and communicates how the Purchasing plans to make a difference.
Weighted Criteria	Are criteria which can be measured in terms of degree of responsiveness.
Weighted Criteria w/ Mandatory Elements	Are criteria that have mandatory minimum requirements defined and also has a measurement above that minimum requirement.

OPTIONAL QUIZ

Now that you have reviewed the manual, test your knowledge of general procurement information. Good luck!

T or F?

1. Contracts for goods and services worth over \$500,000 must go to City Council for approval? ____
2. A contract is ready for use if only the supplier signs it? ____
3. If an organization is not performing per their contract, Purchasing wants to know about the issue? ____
4. It's ok to accept gifts from suppliers as long as they are small items worth less than \$50? ____
5. Quotes are good for a finite amount of time? ____
6. RFP award is made to the lowest responsive and responsible bidder? ____
7. At least three (3) quotes are needed for any goods or services costing under \$2,000? ____
8. Debit card is the payment method preferred by the City? ____
9. An organization can be debarred if they break a local law in Woonsocket? ____
10. ITB typically has the shortest decision lead time? ____
11. RFI determines the most qualified firms by which you can negotiate with for a contract? ____
12. Sole source and single source definitions are interchangeable? ____
13. Central Store is responsible to manage the core inventory of office supplies for each Department? ____
14. An RFQ scoring criteria can either be mandatory, weighted or mandatory w/weighted element? ____
15. RFP requires an evaluation panel? ____
16. A good project scope leaves little to interpretation and protects the interest of the City? ____
17. A formal solicitation should be open for at most 30 calendar days? ____
18. The cone of silence only applies until the sealed bids are opened? ____
19. It's a good idea to have a consultant participate in a scoring evaluation for an RFP? ____
20. Supplier preference can be a justification to use a single source? ____

OPTIONAL QUIZ – ANSWER KEY

Now check your answers to the answer key below. How did you do?

T or F?

1. Contracts for goods and services worth over \$500,000 must go to City Council for approval? **_T_**
2. A contract is ready for use if only the supplier signs it? **_F_**
3. If an organization is not performing per their contract, Purchasing wants to know about the issue? **_T_**
4. It's ok to accept gifts from suppliers as long as they are small items worth less than \$50? **_F_**
5. Quotes are good for a finite amount of time? **_F_**
6. RFP award is made to the lowest responsive and responsible bidder? **_F_**
7. At least three (3) quotes are needed for any goods or services costing under \$2,000? **_F_**
8. Debit card is the payment method preferred by the City? **_F_**
9. An organization can be debarred if they break a local law in Woonsocket? **_T_**
10. ITB typically has the shortest decision lead time? **_F_**
11. RFI determines the most qualified firms by which you can negotiate with for a contract? **_F_**
12. Sole source and single source definitions are interchangeable? **_F_**
13. Central Store is responsible to manage the core inventory of office supplies for each Department? **_T_**
14. An RFQ scoring criteria can either be mandatory, weighted or mandatory w/weighted element? **_T_**
15. RFP requires an evaluation panel? **_T_**
16. A good project scope leaves little to interpretation and protects the interest of the City? **_T_**
17. A formal solicitation should be open for at most 30 calendar days? **_F_**
18. The cone of silence only applies until the sealed bids are opened? **_T_**
19. It's a good idea to have a consultant participate in a scoring evaluation for an RFP? **_F_**
20. Supplier preference can be a justification to use a single source? **_F_**