

PGCRC
Draft Procurement Policy
Effective 7/1/2018

Procurement Policy

PGCRC is utilizing the grace period allowable under Uniform Grant Guidance. This policy will become effective July 1, 2018.

Purpose

The purpose of this policy is to ensure that goods and services purchased for the performance of a federal grant are obtained in a cost-effective manner and in compliance with federal regulations.

Scope

This policy applies to PGCRC's employees authorized to initiate and/or approve purchases paid with federal grant funds.

Responsibility

The Program Director/Manager is responsible for determining whether a purchase is allowable under the terms of the federal grant and will ensure purchases are in accordance with this policy. The Executive Director will provide decision support upon request.

The Executive Director is responsible to review the completed vendor selection form for reasonableness and compliance with PGCRC's procurement policy, and approve the selected vendor.

The Bookkeeper will retain documentation of purchase transaction records under federal grants.

Code of Conduct

As representatives of PGCRC, all employees are expected to conduct themselves in a professional and ethical manner, maintaining high standards of integrity and the use of good judgment. Employees are expected to be principled in their business interactions and act in good faith with individuals both inside and outside PGCRC.

The following Code of Conduct shall govern the performance, behavior and actions of PGCRC., including Board members, employees, directors, volunteers, or agents who are engaged in any aspect of procurement, including – but not limited to – purchasing goods and services; awarding contracts and grants; or the administration and supervision of contracts.

1. No employee, officer, director, volunteer or agent of PGCRC shall participate in the selection, award or administration of a bid or contract supported by federal funds if a conflict of interest is real or apparent to a reasonable person.
2. Conflicts of interest may arise when any employee, officer, director, volunteer or agent of PGCRC has a financial, family or any other beneficial interest in the vendor firm selected or considered for an award.

3. No employee, officer, director, volunteer or agent of PGCRC shall do business with, award contracts to, or show favoritism toward a member of his/her immediate family, spouse's family or to any company, vendor or concern who either employs or has any relationship to a family member; or award a contract or bid which violates the spirit or intent of Federal, State and local procurement laws and policies established to maximize free and open competition among qualified vendors.

4. PGCRC's employees, officers, directors, volunteers or agents shall neither solicit nor accept gratuities, gifts, consulting fees, trips, favors or anything having a monetary value in excess of \$25 dollars (\$25) from a vendor, potential vendor, or from the family or employees of a vendor, potential vendor or bidder; or from any party to a sub-agreement or ancillary contract.

Vendor Selection Requirements

	Less than \$10,000	Between \$10,000 and \$250,000	Greater than \$250,000
Bid process required?	No	Written	RFP
Acceptable forms of comparison	N/A	Verbal, published catalogues, written	Written only
Minimum number of bids required	3 price checks (recommended)	3	3
Submit bid documentation to the Bookkeeper?	No	Yes	Yes

For Micro-purchases under 48 CFR Subpart 2.1 Currently: under \$10,000:

A minimum of three (3) prices, written or verbal, should be obtained. Formal documentation of vendor selection is not required. Buyers are expected to conduct an informal cost/price analysis and select the vendor offering the best mix of quality, service and price for the specified need. Reasonable efforts shall be made to ensure fair and competitive pricing.

For Small purchases under 48 CFR Subpart 2.1 Currently: from \$10,000 to \$250,000:

A minimum of three (3) prices, written or verbal, are required. Vendor selection must be made on the basis of the same precise and accurate description of the specifications and technical requirements for the item or service. Web price lists and catalogue listings, as well as telephone quotes, can be considered. **Buyers must complete a Vendor Selection Form. A copy of the completed form must be attached to the selected vendor's invoice and submitted to the Accounting/Finance Office for payment.**

For purchases under 48 CFR Subpart 2.1 Currently: \$250,000 and over:

A minimum of three (3) written bids are required. The bids may come in response to a formal Request for Proposal (RFP) or a Request for Quote (RFQ). Each vendor must be provided with the same precise and accurate description of the specifications and technical requirements for the item or service. Written bids may be received by mail, fax or email and should be signed/e-mailed by an authorized representative of the vendor. See Obtaining Competitive Bids below. **Buyers must complete a Vendor Selection Form. A copy of the completed form and all written bids must be attached to the selected vendor's invoice and submitted to the Accounting/Finance Office for payment.**

When lease options are available, an analysis of the lease versus buy option must be performed to determine which alternative would be the most economical and practical form of procurement.

Obtaining Competitive Bids

Solicitations for goods and services shall provide the following:

- A clear and accurate description of the technical requirements for the material, product, or service desired. The description shall not be designed to limit competitive solicitation from multiple vendors.
- Requirements that the bidder must fulfill and all other factors to be used in evaluating bids and proposals.
- A description of the technical requirements in terms of functions to be performed or performance required, including the range of acceptable characteristics or minimum acceptable standards.
- Preference, to the extent practical and economically feasible, for products and services that conserve natural resources and protect the environment and are energy efficient.
- Positive efforts shall be made to utilize small-business, minority-owned firms and women's business enterprises, whenever possible.

Non-Competitive Vendor Selection

Occasionally, a buyer is unable or chooses not to competitively bid the requirements. These situations are characterized as Single Source or Sole Source transactions.

Alternative vendors exist in the competitive market, but the buyer chooses to solicit a bid from only one particular vendor because of technical requirements (precision, reliability), past performance by other vendors (poor service, availability of parts), or a current or historical relationship between the selected vendor and PGCRC.

Buyers must fill out a Vendor Selection Form and write a narrative justification for the non-competitive procurement.

PGCRC

VENDOR SELECTION FORM

FOR PURCHASES EXCEEDING \$10,000

In order to be in compliance with the Uniform Grant Guidance and PGCRC's procurement policy, the vendor selection form must be completed for purchases exceeding \$10,000. This completed form **MUST** be submitted to the Bookkeeper with all supporting documentation before entering into a service/purchase contract or making a payment to the vendor.

I. Competitive Bids – In the table below, please provide quote information relating to the requested service / product. Please attach copies of these quotes with the complete form and purchase request.

Vendor	Quote #	Date of Quote	Amount (\$)

II. Awarded Bid – Please check the method used for vendor selection.

Selected Vendor: _____

Lowest bid awarded. This is applicable when the competitive bidding process was utilized, and selection was based on the lowest price.

Bid awarded on other criteria. This is applicable when the competitive bidding process was utilized, and selection was based on criteria other than lowest price. Examples for selection include, but are not limited to: feasibility; availability, or quality.

o Please provide an explanation of how the awarded bid was selected:

o Please provide a price justification in Section III of this form.

Single Source awarded. A selected source is applicable when other alternative vendors exist in the marketplace, however, a vendor is selected without competitive bids based upon: technical requirements (prevision, reliability) of the requested product; past performance by other vendors, or a current or historical relationship between the selected vendor and PGCRC.

o Please provide an explanation of how the awarded bid was selected:

o Please provide a price justification in Section III of this form.

Sole Source awarded: A sole source selection is applicable when no other vendor is capable of providing the requested service or product. Please provide an explanation of:

o Reason the purchase is considered to be “sole source”:

o Reason why the vendor was selected:

o Description of the selection process:

o Explanation of how the price was determined to be “reasonable”:

III. Determination of Reasonable Price

Please select the statement below that best reflects how the price of the awarded bid was considered “reasonable”.

- Competitive bidding - Lowest price was selected.
- Competitive bidding – Lowest price not selected, however, based on other selection criteria and full comparison, price was determined to be reasonable.
- Price comparison:
 - Reasonable price as compared with like or similar items purchased previously through Purchasing.
 - Reasonable price as compared with like or similar items available in a catalog, website, or advertisement. Please provide a copy of the source.
- Rate / cost negotiated with an approved vendor per an existing contract or agreement. Please reference the date of the agreement.
- Other: Please provide an explanation.

IV. SAM Check

SAM check: Verified that a vendor is not debarred, suspended or otherwise excluded from or ineligible for participation in Federal assistance programs or activities. This can be accomplished by visiting: <https://www.sam.gov/portal/SAM/>

Attach support document (I.e. SAM search result) with this completed form.

