



City of Fitchburg Procurement Presents:

How to Get a Procurement Green Light



This presentation is also known as:
Procurement is not a Road Block, but merely a Speed Bump!

The Commonwealth of Massachusetts has an overarching set of laws pertaining to public procurement.

By Ordinance, all purchase transactions occur under oversight by the Chief Procurement Officer (CPO).

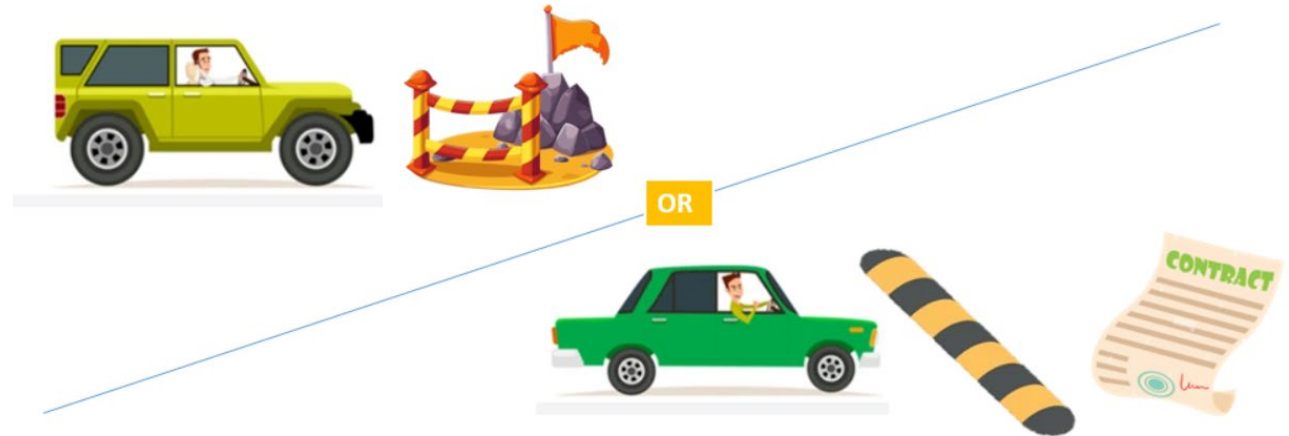
The role of the Procurement Team is not to prevent you from conducting business, but to be sure it's done within the parameters of MA General Law.

Done correctly, procurement results in a legal contract, but just as important - a transaction applying taxpayer funds in the most transparent, efficient, and budget-conscious manner.

There is only  you'll find yourself at a Procurement Road Block:

lack of communication.

The following pages describe the simple communication required to keep you on the road to your destination - on-schedule and hopefully on-budget.



Small Purchases < \$500

Common Sense

For the most part, departments may enter into purchases of < \$500 without a requisition or requirement to go through procurement.

There are some guidelines and exceptions:

You cannot make regular or multiple small purchases to avoid a procurement. This is called “bid splitting” and is illegal.

A purchase where you will need a credit card requires a requisition and approved purchase order in advance, no matter the dollar value.



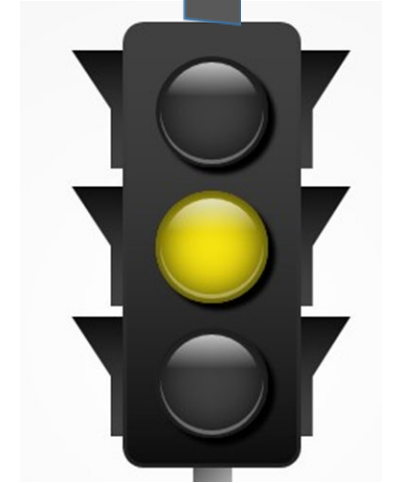
Purchases between \$500 and \$10k

“Sound Business Practices”

Departments should use sound business practices by employing knowledge of the market, comparison pricing, or “shopping it out.”

A requisition in Munis is required, and any supporting documentation should be electronically attached to the requisition. This enables an easy approval process and conversion to a Purchase Order.

Note: if there is a labor component to your transaction, Prevailing Wage is required. The Prevailing Wage schedule for work under \$10k is located on the Public Drive under Procurement-Shared.



Purchases between \$10k - \$50k

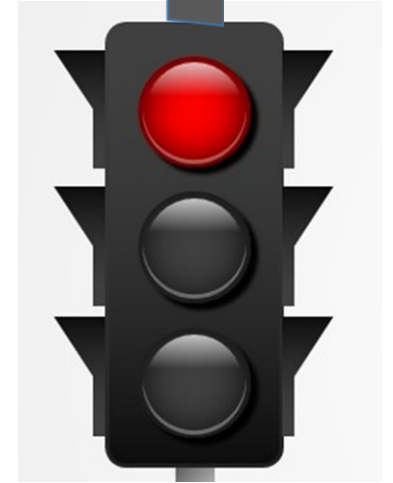
Requires Procurement – Quote Process

Departments must submit a Procurement Request Form at least 4 weeks in advance of needing the contract. This is because of the time it takes to develop a solicitation, and because advertising requirements apply for construction projects.

Procurement Request Form must be accompanied by specifications or scope of work in order to proceed. In many cases, the Procurement Team can assist with finding samples.

A Procurement Request form is still required, even if using a State Contract.

Note: if there is a labor component to the contract, Prevailing Wage is required. The Procurement Team must apply for specific Prevailing Wage schedules for each individual project and include it with the quote request.



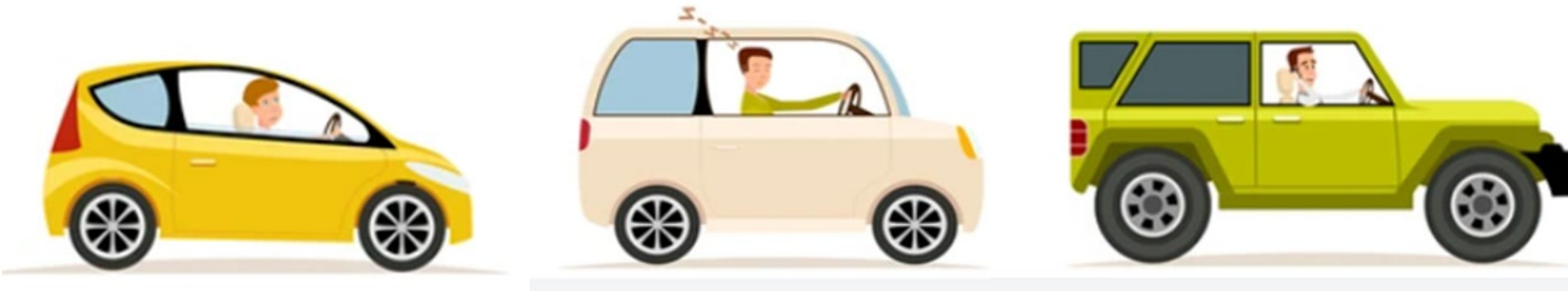
Purchases over \$50,000

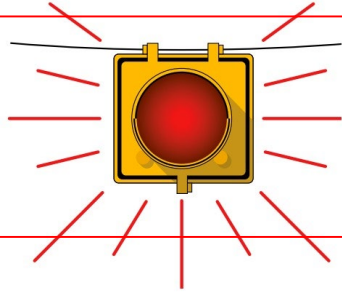
Requires Procurement – Bid Process

Departments must submit a Procurement Request Form at least 6 weeks in advance of needing the contract. This is because of the time it takes to develop a solicitation, and because longer advertising requirements apply for construction projects.

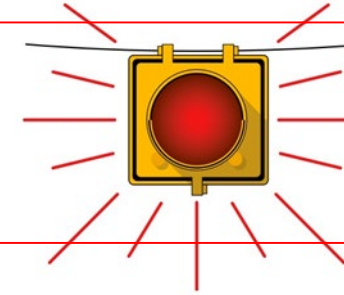
Procurement Request Form must be accompanied by specifications or scope of work in order to proceed. In some cases, the Procurement Team can assist with finding samples.

Note: if there is a labor component to the contract, Prevailing Wage is required. The Procurement Team must apply for specific Prevailing Wage schedules for each individual project and include it with the solicitation .





Emergencies



Data Breach



In qualifying emergency situations (when there is danger to health or safety), procurement laws may be waived.

For c.30B the CPO can approve an emergency procurement.

Under c.149 and c. 30, 39m, some aspects such as advertising requirements may be waived by request and written approval from the Division of Capital Asset Management and Maintenance (DCAMM).



Procurement Requests

1. Identify your need.



Determine what you are looking for, what kind of performance you seek from the product/service/project, and what type of vendor or contractor will be able to provide what you need.

2. Gather your information.



Use resources (colleagues or contacts) to put together the information that will help attract the right type of business but will also allow you to remain within confines of your budget.

3. Submit your request.



Prepare the Procurement Request form, along with scope or specs, and send to the Chief Procurement Officer, who will apply the correct procurement process and work with you.



City of Fitchburg, Massachusetts
Purchasing Department

Submit Form

PROCUREMENT REQUEST FORM (\$10,000 or more)

Complete and send to Chief Procurement Officer, along with specifications.

Requesting Department: _____ Contract Manager: _____

Date Submitted: _____ When Needed: _____

Please check one:

- ☐ c. 7, Design RFQ
- ☐ c. 149, Building Construction (Quote or Bid)
- ☐ c. 30, 39m, Public Works Construction (Quote or Bid)
- ☐ c. 30b, Goods and Services (Quote, Bid, or RFP)
- ☐ c. 25a, Energy-Related Project

Title: _____

Brief Description of Project/Item/Service: _____

Project Location: _____ Is a pre-bid meeting or site visit required? _____

Suggested Contract Term (length): _____ (up to 5 years)

Name of architect and/or engineer working with the City: _____

Are you aware of any state contract or other contract that may be looked at? _____

Contact Info for Contractors/Vendors you would like contacted (if any): _____

What is the source(s) of funding (City funds, grant, ESSER, ARPA)? _____

(For City Departments) Does this project/product/service involve technology or software? _____

Estimated Value of Contract: \$ _____ Estimation Method: _____

Check below if, to the best of your knowledge:

- ☐ Funding is not yet in place for this request.
- ☐ This is something new that has never been procured for the City.
- ☐ Other departments may be interested in the same project/item/service.
- ☐ Specifications have been provided by an outside source (vendor, designer, or consultant).

Specifications may be emailed to procurement@fitchburgma.gov or
placed in the Public Drive under Procurement Shared – Share Folder for Departments.
Request will go into the procurement queue when final specifications are provided.

For Purchasing Use Only

Received Date: _____

Contract Number: _____

Requestor will receive key solicitation dates and details by
email when contract number is assigned.

This form now found at
[http://www.ci.fitchburg.ma.us/760/
City-Staff-Resource-Page](http://www.ci.fitchburg.ma.us/760/City-Staff-Resource-Page)
and can be submitted directly to us
by email using the
“submit form” button.

Specifications/Scope of Work



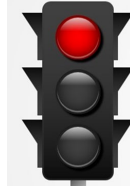
1. Simple Descriptions

For lower value or easily described items or work, you may be able to use a simple description and will get what you need.



2. Complex Descriptions

For high value items, complicated items or work, you may need help from a professional to compose adequate specifications or scope.



3. Proprietary Specifications

You are not allowed to simply say “I want new a Red Dodge Ram 1500.” You *can* say, “I want a new red, 8 cylinder, 8 speed auto transmission vehicle...”

Sole Source

Per the Office of the Inspector General: You may award a sole-source contract of not more than \$50,000 if a reasonable investigation indicates that there is only one practicable source for the supply or service you are procuring.

Procurement Request Form and the Procurement Itself

Once the Procurement Request is received and accepted, a contract number is assigned and the solicitation is added to our Procurement Tracker.

Solicitation documents are developed, advertising is placed, prevailing wages are applied for, and the solicitation is placed on the City website.

The department head will receive Outlook notifications for all solicitation activity, including pre-bid/rfp meeting, and opening of sub-bids, opening of bids or rfps.

Department heads and staff are always welcome to attend openings. Regardless, after an opening, a summary is sent to the contracting department for review.

The Department Head should send a recommendation to award the contract in a timely manner so a contract can be created and executed.



Finally...About Contract Management



City departments are reminded of the importance of contract management.

Good contract management:

- Ensures the City does not pay more than the contract requires.
- Ensures the quality or performance promised is met or exceeded.
- Documents both good and bad experiences, which **may** be used in determining responsibility in the future.

- ✓ **COMPARE** invoices to the contract and purchase order.
- ✓ **CONFIRM** that work was completed before paying invoices.
- ✓ **RECEIVE AND REVIEW** certified payroll reports before paying any invoice that includes labor.
- ✓ **VERIFY** that the all charges you're being billed for are allowed under the contract/terms and conditions.
- ✓ **TAKE** discounts or adjustments stated in the contract.