



Purchasing Policies and Procedures Town of Walpole, Massachusetts

Guide for Departments, Boards, and Committees

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Town of Walpole Purchasing Policy

Board of Selectmen Policies & Procedures – Section 701

The Town Of Walpole as stated in its Charter, Article IV, Section 4-3 empowers the Town Administrator to purchase all goods and services for the Town of Walpole. The Purchasing Department shall act on the Town Administrator's behalf and oversee and facilitate the Purchasing done by all Town Departments using the MUNIS Purchase Order system.

Purchasing shall also coordinate centralized purchasing for commodities such as paper, envelopes etc. and also conduct formal bidding for goods and services as dictated by Massachusetts General Law. In monitoring all purchasing functions done by employees of the Town of Walpole, the Purchasing Department is responsible that purchases are made in an open, fair, competitive manner and goods and services are obtained at the lowest responsible and responsive cost.

Introduction

This guide has been developed to serve as a reference tool for all departments of the Town of Walpole to better understand the myriad of requirements when purchasing or procuring needed supplies, services, and materials for your department.

The references contained within were compiled in accordance with state statutes and Town of Walpole policies and procedures and is intended to cover a broad range of issues and responsibilities when embarking on the procurement process. It is important to note that this guide highlights particular compliance requirements and are meant to provide a general overview of principal procurement statutes, and are not a substitute for reviewing the statute or obtaining advice.

The key objectives of the Town's Purchasing Office are:

- Help identify need through strategic planning process
- Conduct basic market research to estimate the cost
- Procure materials, supplies, equipment, and services at the lowest possible cost consistent with the quality necessary for the proper operation of the various departments
- Maintain and honor the Town's reputation for fairness and integrity and to promote impartial and equal treatment to all those who wish to conduct business with the Town
- Encourage a mutually cooperative relationship with requesting departments in order to facilitate and maintain fair, consistent, and expansive procurement

In addition to monitoring compliance, it is our goal to also help facilitate efficiency and best value to the Town Departments. The Purchasing Office is available to provide guidance, internal support, and procurement assistance in the development and solicitation of public bids and proposals.

Hopefully this guide will serve as a useful resource to your department as you start to consider what supplies and services you need to execute your department's mission. As always, if you ever have any questions about these processes, please do not hesitate to contact either of us at any time.

Sincerely,

James A. Johnson
Town Administrator

Patrick Shield
Assistant Town Administrator

Kelli Murphy
Purchasing Assistant

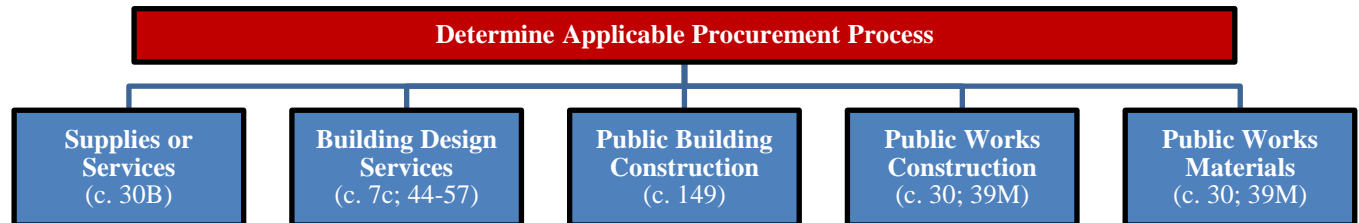
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Please also visit www.walpole-ma.gov/purchasing for additional quick links and resources, such as the

Getting Started Checklist:

- Determine the Required Supply or Service**
What does your department need to purchase / what is your department trying to accomplish?
- Determine Applicable Procurement Process**
Stop by the Purchasing Office if you need help identifying the process and the steps that need to be followed for your procurement



- Estimate Total Cost of the Supply or Service**
 - Is the cost between \$1 - \$10,000?
 - Is the cost between \$10,000 - \$50,000?
 - Is the cost greater than \$50,000?
- Identify Project Schedule / Timeline**
Remember it may take some time for quotations to be returned, bids / proposals to be received, and contracts to be awarded
- Identify / Secure Funding Source**
 - Operating Budget
 - Capital Funding
 - Other (grant, donation, etc.)
- Proceed with Relevant Procurement Procedure**
Depending on the procurement process and the total cost of the supply or service, it may trigger additional requirements for procurement, advertising, and record-keeping.

STOP If you are unfamiliar with this process, please check with the Purchasing Office, Town Administrator, or Assistant Town Administrator before proceeding with this step.

<i>Under \$10K</i>	<i>Between \$10k - \$50K</i>	<i>Greater than \$50K</i>	<i>Design Services</i>
Sound Business Practices	Solicit 3 Written Quotations	Sealed Bids / Proposals	Request for Qualifications

- Evaluate and Verify Proposal to Ensure it Meets Your Purchase Description / Specifications**
- Vendor Set Up (If New Vendor)**
 - Vendor Information Form
 - IRS W-9 Form
 - Submit to Accounting
- Place Order / Execute Contract**
- Requisition Submission / Purchase Order Generated**
 - If quote is greater than \$5,000; and/or
 - If Capital and/or Article Funding is used
- Project Start**
You're good to go!

Keep in mind the ability to purchase supplies and materials from State or Collaborative Contracts to save costs and purchase with greater ease and availability!

Determine Applicable Procurement Process

Procurement Bidding Thresholds as of June 15, 2018, pursuant to the passage of Chapter 113 of the Acts of 2018, *An Act Providing for Capital Facility Repairs and Improvements for the Commonwealth*. This table highlights particular compliance requirements depending on the cost or the nature of your procurement. The charts are meant to provide a general overview of the principal procurement statute, and are not a substitute for reviewing the statute or obtaining advice.

* If you are unfamiliar with this process, please check with the Assistant Town Administrator or Purchasing Office before proceeding with this step. *

Supplies & Services – c. 30B

- "Supplies" are defined as "all property, other than real property, including equipment, materials, and printing and further including services incidental to delivery, conveyance, and installation of such property."
- "Services" are defined as "the furnishing of labor, time, or effort by a contractor, not involving the furnishing of a specific end product other than reports."
 - Under \$10,000 Sound Business Practices
 - \$10,000 - \$50,000 Written Description to Solicit 3 Written Quotations
 - Greater than \$50,000 Sealed Invitations to Bid / Request for Proposals

Construction Materials - c. 30 §39M

- Applies to construction materials (without labor) for public works or public buildings.
 - Under \$10,000 Sound Business Practices
 - \$10,000 - \$50,000 Written Description to Solicit 3 Written Quotations
 - Greater than \$50,000 Sealed Bids

Public Works Construction - c. 30 §39M*

- Contracts for the construction, reconstruction, alteration, remodeling or repair of any public work (ie non-building projects, such as a road, bridge, traffic signal, or water / sewer main).
- This work is typically defined as "horizontal construction."
 - Under \$10,000 Sound Business Practices
 - \$10,000 - \$50,000 Written Description to Solicit 3 Written Quotations
 - Greater than \$50,000 Sealed Bids

Building Construction Contracts - c. 149*

- Contracts for "construction, reconstruction, installation, demolition, maintenance, or repair of a building by a public agency.
- This work is typically defined as "vertical construction" Any time you are physically making a change to any structural component of a building – that is considered a building contract.
 - Under \$10,000 Sound Business Practices
 - \$10,000 - \$50,000 Written Description to Solicit 3 Written Quotations
 - Greater than \$50,000 Sealed Bids

Design Services for Building Projects - c. 7c

- Services provided by a designer, programmer, or construction manager in connection with any public building project, including studies, surveys, drawings, plans, or specifications
 - Under \$30,000 None. Recommend Soliciting 3 Written Quotations
 - Greater than \$30,000 Qualifications-based selection process

* *Prevailing Wage Rates Apply*

Requisitions

All purchase requisitions for goods and services greater than \$5,000 in value shall be entered electronically in the Purchasing module of MUNIS, in accordance with MGL c. 30B.

- 1) Over \$50,000 estimate – sealed bids or proposals will be required. Two weeks' advertisement time is the minimum.
- 2) \$10,000 - \$49,999 estimate – written quotes must be obtained / approved by the Purchasing Department
- 3) \$1 to \$9,999 – Sound Business practices
 - a. Any requisition over \$5,000 will require a copy of the written quotation associated with it. Purchasing reserves the right to return / cancel the requisition if it is determined that pricing is not fair or similar to that of others.

The Purchasing Office will process requisitions through recommended sources or alternative, more cost-effective sources whenever possible. Departments are welcome to offer lists of suppliers or distributors of the products and/or services needed.

Requisitions must not be received as confirmations for encumbrance as purchasing personnel may change supplier from what is recommended from the requestor. All requisitions for goods and services MUST have a purchase order issued.

As stated above, all requisitions exceeding \$10,000 must be quoted / bid and/or approved by the Purchasing Department to ensure compliance with public bid laws. It will not be acceptable, nor is it legal, to split requisitions to avoid the competitive process.

Please note that the Town is not responsible for any goods or services without a proper purchase order in place. It is incumbent upon the department and its members to ensure the presence of a valid purchase order PRIOR TO ordering goods or using a vendor's services.

Having a purchase order in place upholds the integrity of the transaction and protects both the vendor and, most importantly, the Town. Moreover, invoices that are dated prior to the issuance of a purchase order may be rejected further delaying the payment process. The Purchasing and Accounting Departments are under no obligation to approve any such payment request. Departments must police their own employees to ensure that this policy is adhered to.

Purchasing Goods / Services for Less than \$10,000

Sound Business Practices

For purchases of less than \$10,000, M.G.L. c. 30B requires only that you use “sound business practices.” “Sound business practices” is defined as “ensuring the receipt of a favorable price by periodically soliciting price lists or quotes.” While the definition does not require a formal competitive process for small procurements of less than \$10,000, it requires you to ensure that you receive the needed quality of supplies and services at a reasonable price.

***** As always, if you have any questions about this procurement method, please contact the Purchasing Office, Town Administrator, or Assistant Town Administrator. *****

Purchasing Goods / Services from \$10,000 to \$50,000

Written Price Quotations

If the contract value will be at least \$10,000 but not more than \$50,000 for the supplies or services, you must solicit at least three written quotes and award the contract to the responsible vendor who gives you the lowest written quote. Under MGL c. 30B, a responsible vendor has the capability to perform fully the contract requirements and the integrity and reliability that assure good faith performance.

When you seek quotes, you need to develop a written purchase description, often referred to as specifications or a scope of services. You are required to develop a written purchase description for contracts of \$10,000 or more. A written purchase description will help ensure you adequately describe what you need to each vendor that you contact for a quote. You then can easily read your description over the phone or fax it to three vendors. You must make sure that each vendor provides a written quote based on the *same* purchase description.

Along with the written purchase description, you must record the names and addresses of all persons you contacted for quotes, the names of all persons who submitted written quotes, and the date and amount of each quote you received.

After you obtain quotes, you have to identify the best-priced quote, which in most cases will be the lowest-priced quote, from a responsible vendor. Make sure that it is based on the supplies or services you specified in your purchase description. You are not required to accept inferior supplies or services. If a vendor providing the lowest quote is offering supplies or services that do not meet your purchase description, you should reject that offer and examine the offer from the vendor providing the next lowest quote. When you have identified the lowest priced offer that meets your purchase description, award the contract to that vendor.

MGL Chapter 30B requires local jurisdictions to maintain a written file for all Chapter 30B contracts in the amount of \$10,000 or more. For contracts between \$10,000 and \$50,000, this file must specifically contain the written purchase description used for the procurement, the names

and addresses of all persons contacted for quotations, as well as the names of all persons who submit quotations, and the date and amount of each quotation received. This will be maintained

Although most departments have adopted their own methods to comply with this requirement, for reference you will find the attached form that can be completed to help meet the requirements of for all requisitions between \$10,000 and \$50,000.

Please submit a copy of the written purchase description / scope of services, the three quotes, and the contact information of the vendors you contacted along with your requisition as backup. These documents will be kept on file both digitally in MUNIS and as a hard copy in the Purchasing Office to comply with the records retention requirement. Please note that a Purchase Order will not be authorized without the three quotations or backup documentation.

Attachment: When submitting a requisition within this threshold, the attached form can assist with obtaining all of the required information.

**** As always, if you have any questions about this procurement method, please contact the Purchasing Office, Town Administrator, or Assistant Town Administrator. ****

Purchasing Goods / Services from \$50,000 or greater

Advertised Competition

Before embarking with the sealed bids or proposals process, please visit the Purchasing Office to be assigned a file number and to discuss compliance with procurement, advertisement, and record-keeping requirements.

If the value of your contract for supplies or services will be more than \$50,000, the contract must be advertised using sealed bids or proposals.

The **Invitation for Bids (IFB)** process requires selection of the lowest-priced bid (or in the case of a contract under which the vendor will make payments to your jurisdiction, the highest-priced bid) from a responsible and responsive vendor who meets your purchase description. The quality requirements that are defined in the IFB will be used to determine bidder responsiveness and responsibility.

The **Request for Proposals (RFP)** process allows for awarding of a contract to the responsible and responsive vendor who submits the most advantageous proposal, based on price and the comparative criteria that are defined in the RFP. The proposal process allows the Town to consider the relative merits of competing proposals meeting the specifications. In order to use the MGL c. 30B RFP process, The Town must document the decision to use an RFP in writing and this must be kept on file in the Purchasing Office.

For most MGL c.30B contracts for supplies and services, it is more efficient to solicit bids rather than proposals because the bid process will usually meet your department's needs and is the

simpler of the two procurement methods. Since the RFP process is inherently more complicated than the IFB process, the use of RFPs should be reserved for procurements in which it is *essential* to consider the relative merits of proposals rather than contracting with the vendor who meets your quality requirements at the lowest price.

When issuing IFB or an RFP, the first step is to develop a purchase description. In your purchase description, you will tell vendors what supplies or services you want and in what quantities. You should specify the schedule for performance under the contract and any specific delivery terms.

Proprietary specifications cite specific brand names or have the effect of restricting the procurement to one product. When procuring supplies or services under 30B, you may use proprietary specifications only if “no other manner of description suffices.” The Department Head must document the decision to use proprietary specification in writing in the form of a memorandum and this must be kept on file in the Purchasing Office. Keep in mind that even when citing a brand name in your specifications is unavoidable, you will often be able to foster competition from multiple vendors offering the brand-name product or service.

You will also establish **quality requirements**, which are standards of quality for the supplies or services you will procure and qualifications a vendor must have to be eligible for a contract. Make sure that your quality requirements are sufficiently rigorous and complete to enable you to reject any bid or proposal that will not meet your stated needs. In the case of an RFP, you will establish comparative evaluation criteria in addition to quality requirements.

Your IFB should specify the **rule for award** and must do so if the contract length will exceed one year. In an IFB process, you will award a contract to the responsible and responsive bidder that meets your quality requirements and offers the best price. As previously noted, a responsible bidder is one who has the capability to perform fully the contract requirements, and the integrity and reliability that assure good faith performance. A responsive bidder is defined by MGL c. 30B as a person or firm who has submitted a bid that conforms in all respects to the invitations to bid.

Best price usually means the lowest price. You must tell vendors how the best price will be determined. For example, will one contract be awarded for everything to the responsible and responsive vendor bidding the lowest total price, or will multiple contracts be awarded, one to each responsible and responsive vendor bidding the lowest price for each type of item procured? In some cases, it may make sense to consider costs in addition to the purchase price: for example, you may want to consider the price of any warranty or maintenance agreement for large pieces of equipment. If you will consider the impact of cost factors in addition to price, you must clearly specify how bid or proposal prices will be calculated and compared.

The IFB or RFP package will include standard forms. MGL c. 30B requires each bidder or proposer to submit a certification of good faith, often referred to as a “non-collusion form,” certifying that the bid or proposal was made in good faith and without collusion or fraud. A copy of the non-collusion form will be included the IFB or RFP to ensure that vendors comply with this requirement. The IFB or RFP package must also include contract terms and conditions and bid or proposal submission requirements.

The RFP process is more time consuming than the IFB process because it requires the development and use of another type of evaluation criteria called comparative criteria. Using comparative criteria involves rating proposals as either “highly advantageous,” “advantageous,” “not advantageous,” or “unacceptable.” You decide how these ratings will be applied and inform vendors in the RFP. The key to drafting and using comparative criteria is to clearly define in the specifications the factors that you will use to evaluate proposals that are responsible and responsive: for example, the factors that will distinguish an “advantageous” proposal from a “highly advantageous” proposal.

After the IFB or RFP has been drafted please consult with the Purchasing Office to determine and assist with advertisement requirements.

The next step is to schedule a bid or proposal deadline with the Assistant Town Administrator. If you are soliciting bids, bids will be opened and recorded in an open meeting or in front of one or more witnesses. The names of all bidders and the amounts of the bids will be recorded. The bidding process is a public process, and all documents are public.

If you are soliciting proposals, a register of proposals is received. Proposals will not be opened publicly, but will be opened in the presence of one or more witnesses. Price proposals will be opened at a later time. Regardless of when proposals are opened, the person designated to evaluate the non-price proposals may not know the proposal prices until they have completed their evaluations of the non-price proposals. Proposals are not public records, and their contents may not be revealed until after the evaluation is complete. The register of proposals however is public.

Next the bids or proposals must be evaluated. You have wide discretion to decide what you want to buy and what is required for a bidder or proposer to be deemed responsible and responsive, but once you have set down the rules of the competition they must be applied consistently and fairly. For bids, the best-priced bid from a responsible and responsive bidder will be selected. For proposals, the most advantageous responsible and responsive proposal will be selected, taking into consideration both price and non-price proposals.

If the prevailing bids or proposals meet the minimum requirements, recommendation will be provided to the Board of Selectmen to award, sign, and execute the contract. A file of all written documents required by MGL c. 30B must be maintained for a period of six years from the date of final payment under a contract. For Invitations for Bid and Requests for Proposals, the written documentation will be kept on file by the Purchasing Office.

***** As always, if you have any questions about this procurement method, please contact the Purchasing Office, Town Administrator, or Assistant Town Administrator. *****

Prevailing Wages & Certified Payrolls

The Massachusetts Prevailing Wage Law MGL c. 149, §§ 26 - 27 ("The Prevailing Wage Law") requires contractors performing work for public construction projects to pay prevailing wage. The prevailing wage law establishes special minimum wages that are paid to employees engaged in public construction projects. Prevailing wage rates for public construction projects are established by the Department of Labor Standards (DLS) within the Executive Office of Labor and Workforce Development. DLS sets prevailing wage rates according to collective bargaining agreements that are established by trade unions from each geographical territory across the state.

Please be advised the prevailing wage laws also exist for certain contracts other than construction contracts. For example,

- MGL c. 71 §7A requires prevailing wages for school bus drivers under certain circumstances;
- MGL c. 121B §29 requires prevailing wages for certain housing authorities;
- MGL c. 149 §27F requires prevailing wages for certain non-construction public works, such as trash hauling; and
- MGL c. 149 §27G requires prevailing wages for moving office furniture and fixtures.

Before soliciting bids for any public construction project, the Town must obtain a prevailing wage rate sheet from DLS. **Each prevailing wage rate sheet applies only to the project for which it is issued.** The prevailing wage rates for each construction project are in effect for 90 days from the date of issue. Projects not bid within 90 days of the issued rates will require the Town to request new prevailing wage rates.

Once a project has been awarded, the prevailing wage rate schedule will apply for the duration of any contracts which result from that bid, except in the case of multi-year projects. For projects lasting more than one year, the Town must request annual updates to the wage schedules. All wage increases listed on the schedule, if any, must be paid on the dates indicated.

During the construction project, it is the Town's responsibility to monitor contractors' compliance with the prevailing wage law. Weekly payroll records must be collected from all contractors and kept on file. These weekly payroll records must be maintained by the Purchasing Office for three years following the final payment on the construction project.

To request a prevailing wage rate schedule, please contact the Purchasing Office which will request one from DLS.

Prevailing wage schedules must be included in the request for quotations, IFB or RFP.

Reminder - There is no threshold for the Prevailing Wage Law to apply. It applies for all Public Works (c. 30; §39M) and all Public Building projects (c. 149) beginning at dollar one!

Questions / Addendum

All questions and supplemental instructions to vendors must be in the form of written addenda to the specifications which, when issued, will become part of the IFB / RFP documents and final contract.

When distributing IFBs / RFPs, it is the preference of the Purchasing Office that all questions from prospective bidders / proposers be submitted in writing to the Assistant Town Administrator or Purchasing Assistant to ensure proper acknowledgement, which will then be redirected to the appropriate Department Head or Architect / Engineer to prepare a response. Completed responses will be distributed in writing by the Purchasing Office to all prospective bidders / proposers on record as having requested the IFB / RFP, to ensure that all responses are provided accordingly and to avoid any potential for a bid protest.

Bid Splitting

Bid-splitting is intentionally dividing a purchase into two or more smaller purchases for the purpose of evading the requirements of a bidding law. This practice is illegal under Chapter 30B. In some circumstances, it makes good business sense to make small, frequent purchases and you should not hesitate to do so. Fresh produce, for example, is typically purchased this way because availability and price fluctuate widely. However a local jurisdiction that makes six separate purchases of \$11,000 each from one vendor in a short period of time by soliciting written quotes is likely to create the impression that it is bid-splitting to avoid the \$50,000 threshold for bids or proposals. If your local jurisdiction makes small, frequent purchases from one vendor, be sure that you can justify the practice with a good business reason.

Purchasing from State or Collaborative Contracts

The Town of Walpole has access to a number of existing state and collaborative contracts that allow departments to purchase goods and services without going through the lengthy procurement process, allowing the Town to purchase with greater ease and availability. State and collaborative contracts are great resources that offer competitive prices and ease of access. Many of the goods and services the Town purchases through our own competitive processes can be found in these state and collaborative contracts. This guide will help you find and utilize these contracts to make your purchasing processes easier.

State contracts

The Operational Services Division (OSD) procures Statewide Contracts for specific commodities and/or services and are recommended for use by municipalities. This allows municipal entities, including schools, to purchase goods and services from statewide contracts without seeking bids or quotations for all thresholds. By using Statewide Contracts, you do not need to invest the time developing solicitations, posting notices, issuing bids, evaluating responses, and executing

contracts. OSD has negotiated the price or competitive quotes and selected the appropriate vendors that meet qualifying criteria.

If you are coordinating with a vendor on a statewide contract, we simply ask that you provide us with the vendor's statewide contract number to accompany the requisition. The vendor should have this information easily accessible to give to you, but if you need help with this, please feel free to ask the Assistant Town Administrator or Purchasing Assistant at any time.

Purchasing off a State Contract

To purchase goods or services off a state contract, we will need to confirm that the chosen vendor can provide the necessary goods and services. Many times vendors are "on a state contract" but the contract they are on is not actually applicable to the goods and services we need. Search COMMBUYS.com to confirm the vendor is on the correct contract, or contact the Purchasing Department for assistance.

All requisitions and/or requests for purchase via these contracts must include a copy of the quote(s) and include a reference to the applicable contract, contract number, and terms and conditions including expiration date of contract.

Collaborative Contracts

A concerted effort has been made in recent years by municipalities to search out, create, or otherwise join purchasing consortiums and collaboratives. Similar to state contracts, purchasing collaboratives allow municipalities to purchase goods and services that have previously procured through a competitive process, saving the Town time and effort, while offering competitive pricing. Unlike state contracts, not all purchasing consortiums satisfy Massachusetts' competitive procurement requirements.

To purchase goods or services from a collaborative contract, the Town must be a member of the collaborative and the contracts must satisfy MGL purchasing guidelines. The Town is already a member of the examples below so to purchase from them, just add the collaborative contract number to your requisition.

The Town has a number of collaborative contracts that have been vetted to ensure they meet MGL requirements. These include, among others:

- MHEC – The Massachusetts Higher Education Consortium (MHEC) is a group purchasing consortium with contracts available to municipalities. Departments who wish to procure items or services from the MHEC contract may do so using the requisition process, indicating the MHEC contract number. The Procurement Office will verify eligibility under the MHEC contract, convert to a purchase order, and place the Department's order. Go to www.mhec.net to access contract lists.
- MAPC – The Metropolitan Area Planning Council (MAPC) has several contracts available to municipalities. Departments who wish to procure items or services from MAPC contracts may do so using the requisition process, indicating the title of the

MAPC contract. The Procurement Office will verify eligibility under the MAPC contract, convert to a purchase order, and place the Department's order. Go to www.mapc.org/collective-procurement to access contract information and buyer information.

- Plymouth County Commissioners – This cooperative contract offers public service and municipal vehicles with equipment options. The City maintains a membership with the Plymouth County Commissioners and any Department wishing to procure items from this contract may do so using the requisitions process, indicating the need for a procurements under the contract. The Procurement Office will verify eligibility under the contract, convert to a purchase order, and place the Department's order. Go to www.plymouthcounty-ma.gov for more information.
- GSA – Government Services Agency contracts are limited in variety, but cover items associated with Homeland Security, telecommunications, and disaster response. Departments who wish to procure from GSA contracts may do so using the requisition process, indicating the title of the GSA contract. The Procurement Office will verify eligibility under the GSA contract, convert to a purchase order, and place the Department's order. Go to <http://www.gsa.gov/portal/content/105300> to access contract information and buyer information.
- Houston Galveston Cooperative (H-GAC) – The H-GAC program has many items available, geared mainly towards public safety. Departments who wish to procure items or services from the H-GAC program should use the requisition process, indicating the item and the corresponding contract. The Procurement Office will verify eligibility under the GSA contract, convert to a purchase order, and place the Department's order. Go to www.hgacbuy.org for more information.

Other Cooperative and Collaborative Contracts –

From time to time, there may be other opportunities which become available to the Town. Should any department become aware of a cooperative or collaborative they are interested in doing business with, the information must be provided to the Chief Procurement Officer (Town Administrator) for a determination of eligibility and approval. The Procurement Team will be aware of additional opportunities as well, and will communicate any such opportunity to Town departments as a matter of routine.

Sole Source Purchases

Competitive bidding requirements may be waived in circumstances when it is clearly determined that there is only one vendor capable of providing a particular good or service. Such instances must be substantiated by the requesting Department Head and must also be documented in writing to the Purchasing Department. It is the department's responsibility to certify to the Purchasing Assistant that only one company can provide the supply or service that is required. A

recent letter from the product manufacturer stating that they are the sole source for the item / service may also be requested. Final determination will be made by the Town Administrator / Assistant Town Administrator.

Sole source purchasing should absolutely be kept to a minimum as any situation which reduces or eliminates competition is unfavorable to the Town's efforts in attaining the best possible pricing. It should be noted that sole source does not mean preferred source but rather the only source capable of meeting minimally acceptable requirements.

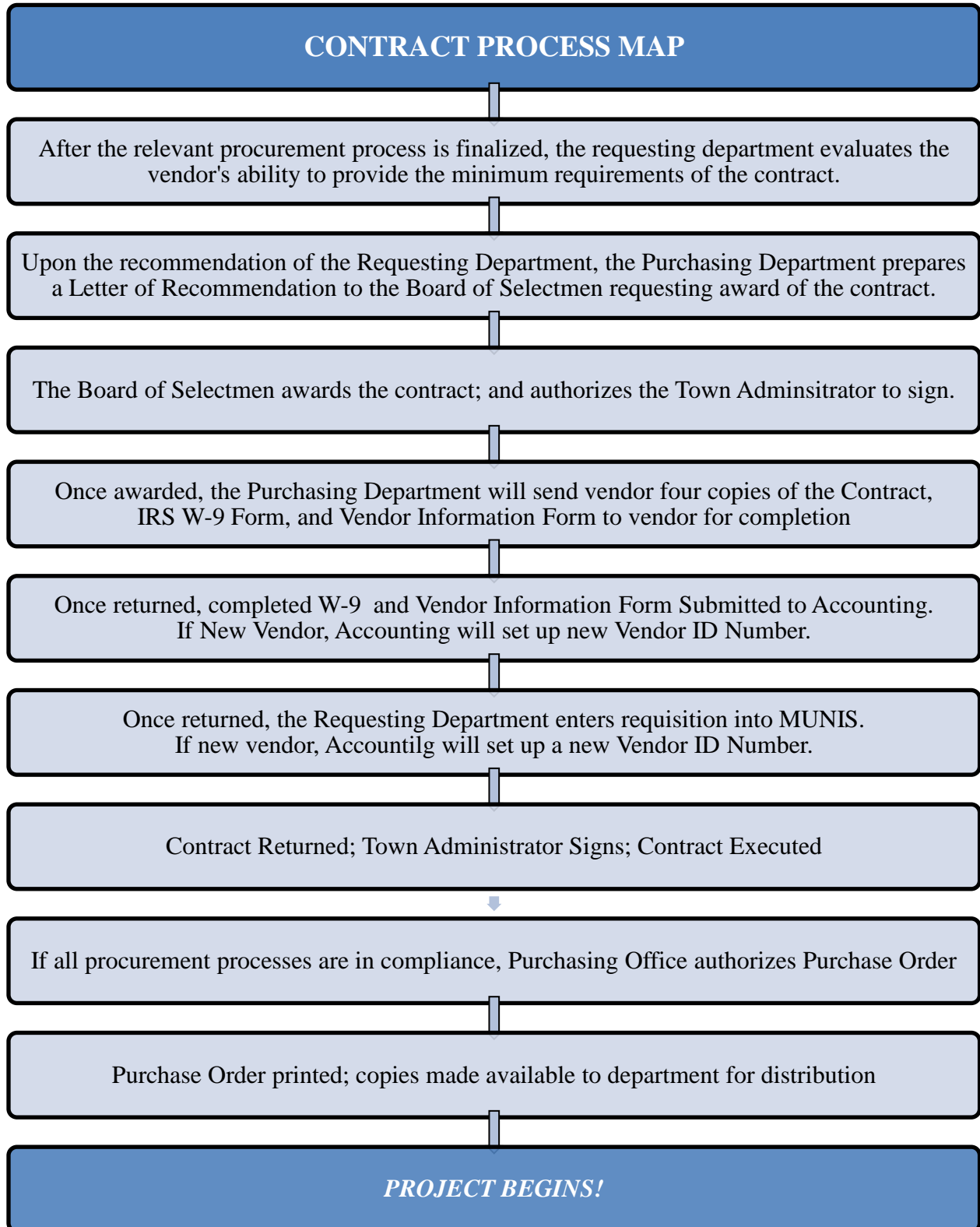
Attachment: When submitting a requisition for a sole-source purchase, please complete the attached Form: Sole Source Determination request.

Attachments

- A. Contract Execution Process**
- B. Instructions for Entering a Requisition into MUNIS**
- C. Price Quotation Form (\$10k - \$50k)**
- D. Sole-Source Determination Request**

Please also visit www.walpole-ma.gov/purchasing for additional links and resources.

A. Contract Execution Process



Instructions for Entering a Requisition into MUNIS

1. Sign into MUNIS
2. Go to Financials
 - a. Then Choose “Requisition Entry”
3. Click on the Green Plus Sign +
4. Type in your department number
5. Hit “tab” and MUNIS automatically inserts a requisition number.
6. Hit “tab” until you get to “General Description”
 - a. Enter a brief description of your order
7. You can skip over “Needed By,” as Purchase Orders are reviewed each day
8. Hit “Tab” to “Vendor” and insert the Vendor Number. MUNIS will automatically insert the vendor address.
9. Hit “Tab” and MUNIS automatically enters the department address.
10. Email and Reference are options. Use if you want items sent to someone’s attention, etc.
11. Hit “TAB” through the whole next screen and line detail will automatically pop up, this is where you will make all your entries for goods, etc.
12. Hit “TAB” to description and enter detail, tab to unit price, and enter the price. Keep pressing “TAB” and MUNIS will automatically total.
13. Hit “TAB” through to org. and enter number, then enter obj. number
14. When done, go to tool bar at the top of the screen and click on the green checkmark. This will save everything you have entered.
15. Go to file, exit. Click on main tab and then click on release. At this point the Department Head may also have to release before it comes to Purchasing for conversion.
16. When the requisition comes to Purchasing for conversion, Purchasing reviews all backup information to ensure compliance with relevant Purchasing Process.
17. If all Purchasing requirements are satisfied, the Purchasing Office converts the requisition for signature by the Assistant Town Administrator. After the Assistant Town Administrator signs the Purchase Order, it will be distributed to the department.

**TOWN OF WALPOLE
QUOTATION DOCUMENTATION FORM
FOR GOODS AND SERVICES \$10,000 TO \$50,000**

DATE: _____

For contracts and purchases \$10,000 or greater but not more than \$50,000, MGL c. 30B §4 requires the solicitation of quotes from at least three vendors who customarily provide the item or service needed.

PLEASE PREPARE & SUBMIT TO PURCHASING AS A BACKUP TO REQUISITION

SUBMITTED BY: _____ **DEPARTMENT:** _____

WRITTEN PURCHASE DESCRIPTION OF ITEM / SERVICES AND SPECIFICATIONS:

Seek quotes from at least three vendors based on the written purchase description provided. You may use any reasonable method for contacting vendors (phone, email, etc.) however the quotation must be in writing and based on the same purchase description.

VENDOR #1

VENDOR #2

Company Name: _____
Address: _____
Email: _____
Phone: _____
Contact Name: _____
Unit Price: _____
Total Price: _____
Solicited by: _____ Date: _____

Company Name: _____
Address: _____
Email: _____
Phone: _____
Contact Name: _____
Unit Price: _____
Total Price: _____
Solicited by: _____ Date: _____

VENDOR #3

IF STATE CONTRACT...

Company Name: _____
Address: _____
Email: _____
Phone: _____
Contact Name: _____
Unit Price: _____
Total Price: _____
Solicited by: _____ Date: _____

Company Name: _____
Address: _____
Email: _____
Phone: _____
Contact Name: _____
Unit Price: _____
Total Price: _____
Solicited by: _____ Date: _____
State Contract No. _____

**PLEASE SUBMIT COPIES OF THE WRITTEN QUOTATIONS WITH THIS COVER SHEET.
NOTE: PURCHASE ORDER WILL NOT BE CREATED UNLESS THREE QUOTATIONS ARE PROVIDED.**

When you solicit quotes under 30B, you are required to award the contract to the responsible vendor offering the needed quality of supply or service at the lowest price.

Contracts greater than \$50,000 require either sealed bids or proposals (MGL c. 30B §§5 & 6).

**TOWN OF WALPOLE
SOLE-SOURCE DETERMINATION
REQUEST FORM**

DATE: _____

A “sole-source” procurement is a purchase of supplies or services without advertising or competition. Chapter 30B places strict limitations on sole-source procurements.

For contracts \$50,000 or less, you may make a sole-source procurement of any supply or service when a reasonable investigation shows that there is only one practicable source for the required supply or service. Your determination that one practicable source exists must be in writing. Please prepare and submit this form to the Purchasing Department as a backup to a requisition. Please note that a Purchase Order will not be generated unless this form is completed in its entirety.

Please note: you may not make a sole source procurement of more than \$50,000, except for the following: software maintenance, library books, and educational materials, and utilities.

PLEASE PREPARE & SUBMIT TO PURCHASING AS A BACKUP TO REQUISITION

SUBMITTED BY: _____ **DEPARTMENT:** _____

Vendor Name:	
Vendor Address:	
Vendor State / Zip:	
Vendor Contact Name:	
Vendor Contact Phone:	

Please itemize specific items to be purchased (attach additional sheets if needed).

QTY	Item Description (Include Specific Title, Model, or Order Number, ISBN Number, etc.)

Total Cost of Procurement (inc. Shipping)

Please indicate the basis for sole-source procurement:
