SUMMARY

In 2021, PPACG performed a major update to its procurement regulations in order to clarify proper procedures and limit exposure to legal and regulatory risk in procuring professional services for federally funded projects. The updated procedures are proportional with and reflect state and federal regulations.

As part of that update, dollar amount thresholds were set for different levels of procurement requirements. These are, specifically –

Up to $5,000 - documentation, no formal requirements
$5,000 – 24,999 - documentation, at least 2 competitive bids
More than $25,000 - advertised RFP and formal procurement

High inflation plus the increasing cost of materials have driven prices up, and a review of peer agency policies was conducted to explore whether increasing any of these thresholds would be reasonable at this point in time. The review revealed that adjusting the first threshold of $5,000 upwards would be somewhat unusual, so that is not recommended. It further revealed that adjusting the $25,000 threshold upward to $50,000 would be in keeping with the state of the practice and is recommended. This would better reflect current market prices and preserve staff resources, i.e. would not require spending substantial staff hours on projects that are of relatively low value, while still maintaining a basic competitive standard and documentation of expenditures.

ACTION REQUESTED: Information Only
Examples of organizations with formal procurement thresholds that are higher than $25,000 (ranging up to $150,000) include DRCOG, Grand Valley MPO, El Paso County, and the City of Colorado Springs.

**RECOMMENDATION**

Require a formal procurement process (RFP, advertisement, selection committee) at $50,000 instead of $25,000, while still requiring at least two competitive bids above $5,000 and appropriate documentation of expenditures at all price levels.

**ATTACHMENT(S)**

Currently approved MPO procurement policy
These supplementary procedures apply where federal transportation funding sources are used for projects of the federally designated Metropolitan Planning Organization of the PPACG. This document does not supersede the PPACG procurement procedures for other expenditures.

Adopted: 5/12/2021
Other Procurement Documents

PPACG Procurement Regulations

PPACG Section 5310 Program Management Plan
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I. REGULATION PARAMETERS

These regulations shall apply to all purchases or contracts using funds under control of the Pikes Peak Area Council of Governments (PPACG) from the Colorado Department of Transportation (CDOT) OR federal funds received through CDOT, for equipment, construction, or services, except for employment of staff. These regulations are established to ensure that such materials and services are obtained in an effective and economical manner and in compliance with the provisions of applicable United States and Colorado laws and regulations. These regulations apply to all officers, employees, and agents of the PPACG.
II. Code of Conduct

A. To help ensure proper segregation of duties, no officer or employee of the PPACG who
approves purchase orders or inputs data into the accounting system may initiate
procurement transactions, except for ordinary purchasing transactions such as travel
reimbursement & etc.

B. Every person engaged in procurement for the PPACG shall act to procure materials and
services at the lowest price, in the proper quality, to reliably accomplish the service
intended; or where creative proposals are sought, to procure services offering the best value.

C. All procurement transactions shall be conducted in a manner so as to provide maximum free
and open competition.

D. Officers, employees, or agents of the PPACG shall neither solicit nor accept gratuities,
favors, or anything of monetary value from contractors, vendors, or potential contractors or
vendors.

E. No officer, member, employee, or agent of the PPACG shall participate in any procurement
decision which affects his/her personal financial interest or the interest of his/her immediate
family or of any corporation, partnership, or association of which he/she is a partner,
member, creditor, or stockholder.

F. No contractor, vendor, or potential contractor or vendor shall bribe, coerce, or attempt to
bribe, coerce, or otherwise improperly influence an officer, member, employee, or agent of
the PPACG.

G. All PPAG officials and employees are governed by the provisions of this policy whether
directly or indirectly involved in a procurement transaction. Violations of these regulations
shall be dealt with as follows: for officers, members, or the executive director, the executive
committee of the PPACG shall examine the case and determine appropriate action; for
employees or agents, the executive director shall examine the case and determine
appropriate action, consistent with the PPACG Employee Handbook; for contractors,
vendors, or potential contractors or vendors, the executive committee or the executive
director shall examine the case and determine appropriate action. Except where a different
process is specified in the Employee Handbook, evidence must be produced and
substantiated to sustain a charge, the accused shall have the right to respond to charges and
to hear evidence submitted, and appeal shall be possible. In the case of an employee appeal,
the Employee Handbook shall be followed; in other cases, appeal should be made to the
governing body of the PPACG.
III. PROCUREMENT PROCEDURE

A. Purchase Requests

All procurement, except as otherwise provided below, shall be initiated on a Purchase Order (PO) or Check Request. The person who makes the request shall include the following information:

- Description of item or service to be performed
- Quantity being ordered
- Purpose of purchase
- Desired delivery or performance date
- Date of request
- Cost
- Grant to which charged, if a grant is chargeable
- Signature of person making request
- The departmental manager’s signature

The request shall first be submitted to the accounting department which shall make the following determinations:

- Whether sufficient funds will be available in the agency budget
- Whether advertising for bids/proposals is required
- If equipment is requested, whether purchase, lease, or some combination would be more economical

The PO or check request will be completed by finance, initialed and forwarded to the executive director. No contract or order shall be issued to any vendor without the approval of the executive director. The approved request shall be returned to accounting and a copy returned to the person who made the request.

For the correct procedure for obtaining a purchase order, see the Purchase Order Request Form Instructions in the attachments.

A PO should be used for recurring monthly billings, long-term contracts, and purchases where multiple payments are required or anytime payment is not required at the time of order. Check requests should be used for reimbursements such as staff travel reimbursements, credit card requests, and routine monthly bills.

Exceptions to the purchase order procedure:

A program manager designated by the executive director to act on his/her behalf may approve any purchase order in the absence of the executive director.

Use of PPACG Credit Card

Use of the PPACG Credit Card may be obtained from the Office Manager after going through the approval process using either a check request or a PO.

The requesting staff member must furnish an approved check request or PO to the Office Manager. The Office Manager will then complete the purchase and give copies of any and
all receipts to Finance and the requesting staff member. The Office Manager will not release the actual card or the card number to any staff member. The Office Manager may designate another administrative staff member to complete a transaction on behalf of a staff member in the event that the Office Manager is unavailable. The designee will also not release the actual card or the card number to staff. In the event that a staff member is unable to get formal approval for the charge in a timely enough fashion, they may, with the permission of their supervisor, opt to use their own credit card and seek reimbursement from PPACG in accordance with the PPACG A/P rules & regulations (checks are cut on the 15th and end of the month only). Any staff member who makes unauthorized charges to the PPACG credit card will be subject to disciplinary actions per the Employee Handbook.

B. Equal Opportunity

All procurement transactions regardless of whether negotiated or advertised and without regard to dollar value shall be conducted in a manner so as to provide maximum free and open competition. Unfair preference shall not be given to large businesses or vendors with personal or business relationships with the PPACG members or staff. Positive efforts shall be made to utilize small business and minority-owned business sources of supplies and services. Such efforts should allow these sources the maximum feasible opportunity to compete for contracts.

Examples of such efforts include the following:

- Advertising solicitations in publications with wide distribution or those known to be used by small and minority-owned firms.
- Making use of minority community organizations to provide timely information about solicitations.
- Distributing or making available information about CDOT’s DBE directory.

All federally-assisted contracts must include the following language: The contractor, sub recipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 CFR part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as the appropriate party (e.g. PPACG, CDOT) deems appropriate, which may include, but is not limited to: (1) Withholding monthly progress payments; (2) Assessing sanctions; (3) Liquidated damages; and/or (4) Disqualifying the contractor from future bidding as non-responsible.

C. Invitations for Bids or Requests for Proposals

Invitations For Bids (IFB) or Requests For Proposals (RFP) shall be based on a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description shall not, in competitive procurement, contain features which unduly restrict competition. “Brand name or equal” description may be used as a means to define the performance or other important requirements of a procurement, and when soused, the specific features of the named brand which must be met by offerors should be clearly specified.
The most appropriate instrument of solicitation should be used for each project. These include, but are not limited to:

RFQ/RFI (Request for Qualifications/Information) - used when it is unknown what is available in the marketplace for completing a specific type of project.

RFB/IFB (Request/Invitation for Bids) - the formal process used to solicit competitive, sealed bids from qualified vendors for goods, and in some cases for services, when complete specifications or specific purchase descriptions are available. The specifications for the items to be procured are not subject to negotiation. The main goals are efficiency and low cost. Bids are commonly sought for construction projects.

RFP (Request for Proposals) - the formal process used to solicit proposals from qualified vendors for services, and in some cases for goods, when the specifications are a desired outcome and recommendations about how to achieve that outcome are requested. An RFP process considers value as well as cost. The terms of the proposals are open to negotiation. This type of solicitation is typically the most appropriate for plans and planning studies.

The selection process for RFPs is the same as identified for IFBs and RFQs with two (2) exceptions:

1. Information concerning the proposals received and other associated information shall not be disclosed until after award of the contract.

2. The identity of competing suppliers and the associated information derived from their RFP response shall not be disclosed to any competing RFP respondent prior to award of the contract.

After award of a contract, information received from all vendors who responded to the RFP shall be considered public information.

D. Advertisement

Formal advertising, with adequate purchase description, sealed bids, and public openings shall be the required method of procurement unless negotiation pursuant to Part E below is necessary to accomplish sound procurement. However, procurements of Twenty-Five Thousand Dollars ($25,000.00) or less need not be so advertised. In this case, documented, competitive bids from at least two (2) separate sources are all that is required.

For contracts over $25,000, printed proposals in response to such advertisement shall be submitted in a sealed envelope. An electronic version that can be distributed to selection committee members shall be sent immediately after the closing date. No proposal shall be opened before the time specified in the solicitation. A register of the dates and times when proposals are received shall be maintained. Upon the specified time for opening proposals, all proposals shall be opened in public with the names of the proposers read aloud. All proposals are to be opened in a manner that will not reveal their contents and shall be withheld from public inspection until after award of the contract.

Multi-year contracts for amounts greater than $25K, whether or not paid in yearly
installments, will require a formal solicitation unless annual renewal is optional, as in the case of maintenance contracts. Optional annual renewals below $25K need not be advertised.

<table>
<thead>
<tr>
<th>Threshold</th>
<th>Purchasing Methods</th>
<th>Solicitation &amp; Advertising Requirements</th>
<th>Documentation/Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,000</td>
<td>Negotiated Procurement, Informal Proposals</td>
<td>None</td>
<td>Purchase Order</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Scope of Work</td>
</tr>
<tr>
<td>$25,000</td>
<td>Negotiated Procurement, Informal Proposals</td>
<td>Documented, competitive bids from at least two (2) separate sources</td>
<td>Purchase Order</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Scope of Work</td>
</tr>
<tr>
<td>&gt;$25,000</td>
<td>Formal Proposals</td>
<td>Request for Proposals (RFP), Request for Qualifications (RFQ), Request for Bids (RFB) (as appropriate)</td>
<td>Purchase Order</td>
</tr>
<tr>
<td></td>
<td>Negotiated Procurement with express approval of grantor agency</td>
<td>Advertisement in general-circulation local area newspaper</td>
<td>Scope of Work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advertisement in state- or nationally-circulated venues as appropriate</td>
<td></td>
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<tr>
<td></td>
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<td>Publication on website Sealed Proposal &amp; Cost Proposal</td>
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<td></td>
<td></td>
<td></td>
<td>Formal solicitation</td>
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<td></td>
<td>Vendor Selection Committee</td>
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<td></td>
<td></td>
<td></td>
<td>Selection Justification</td>
</tr>
</tbody>
</table>

When advertising a solicitation, advertisement must happen over a certain period of time in order to ensure preparation time and thoughtful responses from vendors. The following information should be clearly listed:

- RFP Issued: (date)
- Cutoff for Questions: (at least 5 business days prior to due date)
- Proposals Due: (at least 15 business days from first advertisement)
- Consultant Selection: (date)
- Notice to Proceed (estimate): (estimated date)
- Contract End Date: (date)

The office/address to which submissions are to be delivered.

Any other instructions and information to vendors concerning the submission requirements.

The project description that includes the Specifications and/or Scope of Work (SOW) or...
Scope of Services (SOC).

The contract terms and conditions, including insurance, bonding and security requirements, and any federal, state or local government requirements as applicable, in the form of an attached copy of the standard contract.

The basis of award, delivery, or performance schedule.

A “Not To Exceed” value may be listed in an RFP. This is preferable to listing a budget or range.

Addenda/Amendments to solicitations shall be identified as such and may require that the vendor acknowledge receipt of all amendments issued. The amendment shall reference the portions of the solicitation it amends. Amendments shall be sent to all prospective vendors known to have received the solicitation. Amendments shall be distributed within a reasonable time to allow prospective vendors to consider them in preparing their proposals. If the time set for proposal opening will not permit such preparation, to the extent possible the proposal preparation time shall be increased in the amendment.

E. Negotiated Procurement

Compared to sealed proposals, negotiation is a more flexible procedure that includes the receipt of proposals from offerors, permits negotiation, and usually affords offerors an opportunity to revise their offers before award of a contract. Negotiation in the sense of discussion, persuasion, alteration of initial assumptions and positions, and give-and-take may apply to price, schedule, technical requirements, type of contract, or other terms of a proposed contract.

Procurements may be negotiated if it is impracticable or unfeasible to use the formal advertising and bidding procedure. Generally, procurements may be negotiated if:

1. The public exigency will not permit the delay incident to advertising;

2. The material or service to be procured is available from only one person or firm; (all contemplated sole-source procurement where the aggregate expenditure is expected to exceed Twenty-Five Thousand Dollars ($25,000.00) shall be referred to the appropriate grantor agency for approval);

3. The aggregate amount involved does not exceed Twenty-Five Thousand Dollars ($25,000.00);

4. The contract is for professional services, or for any service to be rendered by an educational institution;

5. No acceptable bids have been received after formal advertising;

6. The purchases are for highly perishable materials, for material or services where the prices are established by law, for technical items or equipment requiring standardization and interchangeability of parts with existing equipment; or
7. Otherwise authorized by law or applicable regulations.

In negotiated procurements, competition shall be obtained to the maximum extent practicable. Cooperative purchase arrangements with other units of government may be entered into when the best interest of the PPACG would be served.

F. Procuring Instruments

The type of procuring instruments used (i.e., fixed price contracts, cost reimbursable contracts, purchase orders, incentive contracts, etc.), shall be appropriate for the particular procurement and for promoting the best interest of the program. The “cost plus a percentage of cost” method of contracting shall not be used. Contracts shall include the provisions stipulated in Part 4 below.

G. Contractor Qualifications

Contracts shall be made only with responsible contractors who possess the potential ability to perform successfully under the terms and conditions of a proposed procurement. Consideration shall be given to contractor integrity, record of past performance, financial and technical resources, accessibility to other necessary resources, ability, and character.

H. Procurement Files

Procurement records or files for purchases in amounts in excess of Twenty-Five Thousand Dollars ($25,000.00) shall provide at least the following pertinent information: justification for the use of negotiation in lieu of advertising, contractor selection, and the basis for the cost or price negotiated.

I. Unauthorized Purchases

Except as herein provided, it shall be improper for any employee or agent of the PPACG to purchase any supplies, materials, or equipment, or make any contract for services which will obligate the PPACG, except with approval of the executive director; and any purchase ordered or contract made contrary to these regulations shall not be approved by the executive director, and the PPACG shall not be bound thereby.

J. Contract Administration

A system for contract administration shall be maintained to assure contractor compliance with terms, condition, and specifications of the contract or order, and to assure adequate and timely follow up of all purchases. The executive director shall designate a responsible staff person to monitor contract compliance for each contract entered into. Unless the executive director designates otherwise in writing, the responsible staff person shall be the one who made the purchase request. Each staff person responsible for contract monitoring shall report periodically, and on completion of the contract, on the status of each contract to the executive director.
CONTRACT REQUIREMENTS

Anyone who negotiates a contract on behalf of the PPACG shall include, in addition to provisions to define a sound and complete agreement, the provisions as outlined in the most current sample contract. Attention shall be given to the following points:

E. Provision for administrative, contractual, or legal remedies when contractors violate or breach contract terms, including appropriate sanctions and penalties.

F. For all contracts over Two Thousand, Five Hundred Dollars ($2,500.00), provision for termination by the PPACG including the manner by which it may be effected and the basis for settlement. Contracts shall describe conditions under which the contract may be terminated because of circumstances beyond the control of the contractor.

G. For all contracts over Ten Thousand Dollars ($10,000.00), provision for compliance with Executive Order No. 11246, entitled “Equal Employment Opportunity”, as supplemented in Department of Labor Regulations (41CFR, Part 60). This requires the contractor to have an affirmative action plan or policy which declares that it does not discriminate on the basis of age, race, color, religion, creed national origin, sex, or handicap, and which specifies goals and target dates to assure the implementation of that plan.

H. For negotiated contracts over Two Thousand, Five Hundred Dollars ($2,500.00), provision that the PPACG, the Federal grantor agency, the Comptroller General of the United States, or any of their duty authorized representatives, shall have access to any books, documents, papers, and records of the contractor which are directly pertinent to the contract for the purpose of making audit, examination, excerpts, and transcriptions.

I. For contracts providing services, the executive director shall review the contract to determine that due consideration has been given a hold-out provision applied to the payment schedule.

J. For non-administrative type of contracts in excess of Ten Thousand Dollars ($10,000.00), a provision which requires the contractor to agree to comply with applicable Federal, State and Local controls, orders, or regulations.
IV. VENDOR SELECTION PROCEDURES

A. Pre-proposal conferences may be held if it will improve the responsiveness of proposals. Any such conference should be held at least 5 business days prior to the submission of initial proposals.

B. Project Selection Committee –

1. For projects between $25,001 - $100,000, a project selection committee of at least 3 qualified persons must perform an objective evaluation of each proposal and recommend the most advantageous proposal to the Executive Director. The recommendation of the selection committee must be supported by documentation of an objective selection process (see the Example Objective Scoring Matrix in the attachments).

   For projects between $25,001-100,000, if only one responsive proposal is received, the vendor may be selected if the committee determines that the RFP was appropriately advertised AND the vendor is qualified.

2. For projects over $100,000, a project selection committee of at least 5 qualified persons must perform an objective evaluation of each proposal and recommend the most advantageous proposal to the Executive Director. The recommendation of the selection committee must be supported by documentation of an objective selection process. The selection committee must include the project manager, the most appropriate department manager, and at least 1 currently serving PPACG committee member.

3. For all projects over $25,000 –

   Committee Members shall score each proposal individually and independently; however, group discussions are encouraged to discuss technical views to arrive at a better understanding of proposals during the evaluation process. The results of the scoring by the evaluating committee shall be totaled to determine the overall highest rated proposal.

   Any discussion of consultant fees is prohibited until the selection process ranks the top three proposers. Negotiations may be entered into with the top scoring vendor, moving on to number 2 if negotiations fail.

C. Vendor Questions

1. Reponses to substantive vendor questions during the submission period must be responded to publicly on PPACG’s website, and the exact location where questions and responses will be posted must be included in the RFP.

2. Staff should respond to all appropriate questions in a timely manner, and all answers must be publicly posted 5 business days before the due date so that all vendors have time to address the information.

D. After the due date, the selection committee may request a presentation by or interview with the vendor that will help clarify the proposal. PPACG is under no obligation to accept interview requests from vendors.
Vendors determined to be within competitive range shall be accorded fair and equal treatment with respect to any opportunity for discussion and revisions of proposals, and prior to award, for the purpose of obtaining best and final offers. Auction techniques or disclosure of any information derived from competing proposals are prohibited.

Any substantial oral clarification of a proposal shall be reduced to writing by the vendor.

E. Selection Criteria – project selection criteria should be appropriate to the project and provide PPACG the greatest advantage. Selection criteria must be applied uniformly to all proposals being considered.

1. Committee members individually review and score proposals; then the committee convenes to discuss scores and arrive at a recommended proposal after discussion and totaling of scores.

2. Factors not specified in the Request for Proposals shall not be considered.

3. The final decision for acceptance or rejection of proposals shall be the executive director’s, unless he/she refers the decision to the executive committee or to the PPACG governing body.

F. Any contract shall be awarded with reasonable promptness by appropriate notice to the most responsive, responsible and best-value vendor, which may not necessarily be the lowest-price vendor being selected. In the event that all proposals exceed available funds, PPACG may, in situations where time or economic considerations preclude the re-solicitation of bids, attempt to negotiate an adjustment of the price and/or the Scope of Work with the highest-scoring vendor.

*Any vendor listed in the federal or state suspension and debarment list www.SAM.gov(SAMS) is not eligible for award.

G. Late proposals - any submission or modification received after time and date set for opening shall be considered late and shall be rejected and returned unopened to the bidder, except as provided herein. The responsibility to ensure that bid solicitations are obtained and that bids are received prior to the opening date and time rests with the bidder. Situations such as “flat tires, accidents, or parking problems” shall not be cause for acceptance of late bids. The following exceptions may be allowed:

1. In the event of a public labor unrest (strike or work slowdown) which actually effects mail delivery.

2. There is conclusive evidence that the bid was submitted to the office designated in the solicitation on time and was mishandled (i.e. lost or misplaced).

3. The bid arrived late due to severe weather conditions or a national or local emergency.

4. It was the only bid received.

H. Notice and Award
1. Vendors should be notified of the award decision in a timely manner. For contracts over $25,000, the successful vendor should be formally notified with a Notice of Award, unsuccessful vendors with Notice of Non-Award (templates attached).

2. An unsuccessful vendor may request a debrief after a decision has been made. The goal of any debrief is to provide honest feedback to the vendor about its proposal and/or how to improve future proposals for PPACG, without reference to any specific opportunity.

Debriefings may include the following information:

a. The offeror’s evaluation scores showing the strengths and weaknesses of their proposal as evaluated by the Committee.

b. The overall evaluated cost and technical rating of the winning offeror.

c. The overall ranking of all offerors.

d. A summary of the rationale for award.

e. Answer any relevant questions about the process the offeror may have.

f. Providing point-by-point comparisons of the debriefed offeror’s proposal with those of other offerors, or any items listed in other offerors proposals that may be marked confidential or proprietary is prohibited.

I. Protests

1. An applicant that is aggrieved by an award determination may file a complaint in writing directly to the Executive Director by email (receipt requested) or to 15 S 7th St. Colorado Springs, CO 80905, within 30 calendar days of the date the incident occurred. Complaints that are not received within 30 calendar days of the date the incident occurred will not be considered.

2. The written complaint must include specific grounds for the complaint and related supporting documentation.

3. PPACG shall investigate and resolve the complaint within 15 working days from the time PPACG receives the complaint.

4. The complaint shall be investigated and resolved by the Executive Director or his/her designee.

5. Written notice of the resolution shall be sent to the complainant. This notice shall include:

   a. A summary of the concern or issue;

   b. The results of the investigation into the complaint and the resolution of the concern; and
c. Notification to the complainant of his/her right to appeal the decision if he/she is dissatisfied with the resolution, and instructions for filing such an appeal.

6. If the service provider is dissatisfied with the resolution of the complaint, a written appeal may be filed with the Colorado Department of Transportation Region 2 Local Agency Program Manager within ten calendar days of the receipt of the resolution.

J. If the successful bidder is new to federal projects, a pre-work conference providing an overview of federal requirements and resources is required. The conference should be jointly conducted by staff from the awarding department and the Accounting Department.

K. A contract is not considered to be executed until it has been signed by both the vendor and the PPACG Executive Director. Only the Executive Director or his/her designee may sign on behalf of PPACG. The Accounting Manager and appropriate Department Manager must be notified of any request for the Executive Director’s signature of a legal document at the time the request is made.

L. No billings from the vendor will be honored for costs incurred prior to the Notice to Proceed from PPACG.

M. A source selection file must be maintained whenever a formal solicitation process is required. Each file will contain a copy of the bid or proposal solicitation, a copy of the advertisement, copies of the bids or proposals received from potential vendors, and bid or proposal analysis sheets that justify the award decision.

Andrew Gunning
Executive Director

Date
PURCHASE ORDER PROCEDURE FLOW CHART

Staff Member prepares Check Request/PO, obtains Department Manager approval, and submits to the Accounting Department.

Check Request/PO returned to Staff Member in case of error or disapproval.

Accounting Department reviews for correctness, availability of funds, and need.

Executive Director reviews Check Request/PO for propriety, timing, need, availability of funds. Reviews Staff and Accounting comments. Approves or does not approve.

If acceptable, Check Request/PO is recommended for approval by Executive Director.

Executive Director approves Check Request/PO.

Executive Director does not approve PO.

Copies are filed with Accounting Department.

Copies are filed with Accounting Department.

Staff Member is responsible for purchase: Receives a copy of Check Request/PO.

Copy of denied Check Request/PO is returned to submitting Staff Member.
NOTICE OF AWARD

DATE:

TO:

RE: NOTICE OF AWARD - (NAME OF PROJECT)

The Pikes Peak Area Council of Governments announces its intent to award the contract for the

(Name of Project)

to

(Vendor)

(Vendor) received the evaluation team’s highest ranking. The Pikes Peak Area Council of Governments (PPACG) will be contacting you soon to negotiate a contract. This Notice of Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the PPACG and the apparent successful vendor, (Vendor). (Vendor) shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to PPACG is executed. If the (Vendor) fails to negotiate and execute a contract with the PPACG, the PPACG may revoke the award and award the contract to the next highest ranked vendor or withdraw the RFP. The PPACG further reserves the right to cancel this Notice of Award at any time prior to the execution of a written contract.

Thank you for participating in this competitive selection process. For information about this notice, please contact the undersigned.

(Signature)
NOTICE OF NON-AWARD

DATE:

Dear ____:

The proposal that your organization submitted in response to the solicitation for the (Project Name) has been evaluated along with the other submitted proposals. As a result of that evaluation, it was determined that (Vendor’s) offer was not the most advantageous to the Pikes Peak Area Council of Governments (PPACG).

We recognize that you and other members of your organization have expended time and effort in preparing and presenting your proposal. On behalf of the PPACG, I want to thank you for your interest.

If you have any questions regarding this notice or other matters, please notify me as soon as possible.

It is hoped you will participate in future solicitations issued by PPACG.

Sincerely,

(Signature)
### EXAMPLE OBJECTIVE SCORING MATRIX FOR RFP

<table>
<thead>
<tr>
<th>Scoring Factor</th>
<th>Available Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding of PPACG’s desires and general approach to the project as</td>
<td>30</td>
</tr>
<tr>
<td>demonstrated in the proposed approach</td>
<td></td>
</tr>
<tr>
<td>Vendor’s experience with projects comparable in type, size, and complexity</td>
<td>20</td>
</tr>
<tr>
<td>Qualifications of the staff assigned to this project</td>
<td>20</td>
</tr>
<tr>
<td>Demonstrated ability to perform high quality work, to control costs, and to</td>
<td>15</td>
</tr>
<tr>
<td>meet time schedules</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>85</strong></td>
</tr>
<tr>
<td>Appropriateness and transparency of fees</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total Points</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

*The scoring matrix should be filled out by each selection committee member individually, and the scores then totaled to determine the overall highest-scoring proposal.

**Scores for the non-fee scoring factors should be compiled to determine the top 3 vendors before any discussion of fees.

***All materials related to scoring should be retained in the project files.*
PURCHASE ORDER REQUEST FORM INSTRUCTIONS

A purchase order (PO) may be used any time you purchase a product or contract for services for your department. POs are used for recurring monthly bills, long term contracts, and purchases, when multiple payments are required or anytime payment is not required at time of order. Requestor should make concerted efforts to obtain products and services that are necessary to accomplish the mission of PPACG effectively and at minimal cost.

Below are steps to complete your request for a PO from start to finish:

- Obtain preliminary consent from your Manager/Director. This is to ensure funds are available and there is need for the purchase.
- Download a copy of the PO form, which is located at Purchase Order Request Form.xlsx.
- Enter the vendor name in the Vendor Name field.
- Enter the vendor address in the Vendor Address field.
- Obtain the next available PO # at Purchase Order Sign Out Sheet.xlsx. Be sure to enter the Date, Vendor Name and your name on the PO Sign Out Sheet. Enter your PO # in the Purchase Order Number field on the Purchase Order Request form.
- Enter the accounting code in the Accounting Code field. The account code is a 5 digit number.
- Enter the program code in the Program Code field. The program code is a 3 digit number.
- Enter the work element in the Work Element field. The work element is a 3 digit number or 99999.
- If using multiple accounting codes, program codes and work elements, use the Comments or Special Instructions field or attach an additional page(s).
- Enter the quantity in the Quantity field. A quantity is required in this field. If an annual PO, enter quantity monthly. For example, if this is an annual PO for 12 months of support, you should enter a quantity of 12.
- Enter the description in the Description field. Please enter details of the purchase, including the service period, product names, etc.
- Enter the unit price in the Price field. A price is required in this field.
- If you need to add additional line items to your form, please use an additional form but format the PO# as #####-1.
- The Total field will auto calculate.
- Enter any discount as a negative number in the Discount field. Discounts usually apply if paying early or for large quantities. If no discount, leave blank.
- Enter estimated shipping costs in the Estimated Shipping field. If no shipping, leave blank.
- The Total field will auto calculate.
- Print form and sign your name in the Requested By field.
- Attach any backup documentation. Back up documentation is anything that will show the proposed amount and item/service being purchased.
- Have your Manager/Director sign the form. They will submit the form to Finance.
- The form will be routed to the Finance Manager and the Executive Director for approval.
- Once all approvals are received, a copy of the approved form will be emailed to you. You may now make your purchase. Be sure to keep a copy of the form for your records.
• If you have questions, please contact the AP Specialist in the Finance Department.