

on the purchase requisition process for formal bids.

Purchase of materials, apparatus, construction and repairs, and services

1. Purchase of materials, apparatus, construction and repairs, and services from \$1,000 to \$19,999 are approved per the Signatures and Documentation Requirements chart found on page 2. A purchase order is then issued.
 - A department may conduct its own bid/quote process within this purchase range; however, the Purchasing Division is responsible for reviewing purchase requests for materials, apparatus, construction and repairs, and services to ensure adherence to the City's local vendor preference and local M/WBE vendors are given the opportunity to bid/propose. Explanation of efforts to obtain local businesses and M/WBE businesses shall be included with purchase requests.
2. Purchase of materials, apparatus, construction and repairs, and services from \$20,000 to \$100,000 are approved per the Signatures and Documentation Requirements chart found on page 2. In cases where a properly executed contract or approved Board Resolution is attached as evidence that appropriate approvals were authorized the electronic workflow approval process may be bypassed. All bids must be done by the Purchasing Division unless the City Manager approves the department to do the bid.
3. Request for Qualifications (Professional Services) and Request for Proposals (all other services) greater than \$20,000 must incorporate concise evaluation criteria, a scoring sheet, and M/WBE checklist within the document. The evaluation criteria and scoring sheet must include a weighted amount of 20% for M/WBE participation ~~and 20% for location to City of Winston-Salem~~ unless any exception is authorized by the City Manager. These proposal documents must be reviewed and approved by Business Inclusion and Advancement before releasing to the public for seeking proposals.
4. Purchases, construction, repairs and services greater than \$100,000 are approved by the Governing Body agenda process and the provisions of the M/WBE Program.

NOTES:

- All capital outlay (items costing \$5,000 or more and having a useful life of more than one year) must be approved by the Budget Office. Capital outlays must have a Capital Outlay form signed by the Budget Director or authorized designee.
- Change orders that result in an overrun of budget appropriations follow the same approval rules as the original purchase authorization. Approvals should be received in advance when possible. Change orders that result in crossing over an approved threshold (\$5,000/\$20,000/\$100,000) require the next higher level designated approvals. The City Manager has authority to approve a total of \$100,000 in change orders per individual project. Any purchase with the estimated cost at the borderline (90% or more) of a dollar threshold should be considered for approval at the next higher level but is not a requirement.
- All service/construction contracts must pre-audited by the Chief Financial Officer or designee, evaluated for legality by the City Attorney Office, executed by the City Manager (or Acting City Manager), and Manager's signature attested by City Clerk. Agreements for legal services for any amount must be reviewed and approved by the City Attorney.
- Most purchases of software or subscriptions to use online software and computerized office equipment must be reviewed by the Chief Information Officer.