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1. Account Code Data

1.1 PURPOSE: To ensure the correct financial account codes are used to properly classify goods and services on requisitions processed by Contracting Officers.

1.2 PROCESS: The Contracting Officer will view the Distribution on each line item on every requisition (see Requisition Processing- Contracting Officer section of manual). The Contracting Officer will ensure that the account code in the “account” field is the appropriate code for the item being procured. If the requestor or approver has entered the incorrect account code, it is the CO’s responsibility to change the code to the correct one. A full listing all the account codes can be found here: http://www.business.gatech.edu/cont_web/operating.html

1.3 RESPONSIBILITY: Contracting Officer

1.4 FREQUENCY: For each requisition processed by a Contracting Officer
2. Archiving

2.1 PURPOSE: To provide long term storage for purchasing business records in order to meet legal and fiscal requirements.

2.2 PROCESS:
- Purchase Order documentation less than two years old, (current and prior fiscal year) are maintained in file cabinets in the Purchasing file room.
- Three (3) year old files are removed from the file room at the end of the fiscal year, labeled and stored in the mezzanine in the central receiving area.
- Four (4) year old files are removed from the mezzanine at the end of the fiscal year and forwarded to archives for further retention and management until destroyed per applicable laws governing retained material.
- RFP’s are kept in boxes and stored by RFP number in the mezzanine in the central receiving area indefinitely.

Further information regarding retention and management records reference http://www.library.gatech.edu/archives/

2.3 RESPONSIBILITY: Administrative Assistant

2.4 FREQUENCY: Annually
3. Bid Management

3.1 PURPOSE: To customize the process for the management of processing written and sealed bids in order to comply with DOAS procedures

3.2 PROCESS:

- Bid Positioning
  - Posting a New Bid
    - Contracting Officer will post RFQ per DOAS EQuote system
    - Go to GA EQuote [https://ssl.doas.state.ga.us/PRSapp/EQ_menu_buyer.jsp](https://ssl.doas.state.ga.us/PRSapp/EQ_menu_buyer.jsp)

3.3 RESPONSIBILITY: Contracting Officers

3.4 FREQUENCY: As required
4. Bid Processing

4.1 PURPOSE: To provide a process for soliciting, receiving and awarding bid solicitations in order to comply with DOAS procedures.

4.2 PROCESS:
- Request For Quotes (RFQ) $10000.00 - $24,999.00
  - Contract Officer may informally solicit 3 quotes from known vendors. The quotes maybe submitted in writing and attached to the requisition. Quotes obtained from the requestor are acceptable.
- RFQ $25,000 and greater
  - Go to GA EQuote https://ssl.doas.state.ga.us/PRSapp/EQ_menu_buyer.jsp
  - Award will be made to the lowest responsible and responsive bidder to the RFQ. This is the bidder who submits the lowest price, whose bid meets the specifications, who agrees to contract terms and conditions with the State, and who is clearly capable of performing the resulting contract. Therefore, the awarded bidder may not always be the bidder who has submitted the lowest monetary bid.

Be advised that - Examples of a non-responsible bidder/offeror include, but are not limited to one with a history of non-performance or performance problems on other contracts, a record of financial difficulty, business instability, criminal sanctions, civil sanctions, and/or tax delinquency.

4.3 RESPONSIBILITY: Contracting Officers

4.4 FREQUENCY: As required
5. Campus Requisition

5.1 PURPOSE: BuzzMart requisitions must be used to request the purchase of goods and services not procured with a PCard or Check Request. Goods or services on state or agency contract should be purchase from awarded vendors whenever possible. Department must solicit an adequate number of quotations before placing orders to verify reasonable price.

5.2 PROCESS:

- The BuzzMart Purchase Order (PO) is the only official Georgia Tech purchase order
  - See Policy 5.2 for more information on the requisition process.

5.3 RESPONSIBILITY: Requesters / Approvers / Contract Officers

5.4 FREQUENCY: As required
6. Communications

6.1 PURPOSE: To consistently keep our customers informed of pertinent purchasing processes, procedures and information.

6.2 PROCESS: Communication tools include:

- PeopleSoft Financial Systems sends emails to the appropriate persons on order status
- Website [http://www.procurement.gatech.edu/](http://www.procurement.gatech.edu/)
- See following “Who do I ask document”:
- Purchasing.ask@business.gatech.edu
- Procurement.help@business.gatech.edu
- Purchasing has two email list serves
  - Requesters and Approvers
  - Administrative Network.

6.3 RESPONSIBILITY: Director / Contracting Officers/ Administrative Assistants

6.4 FREQUENCY: As needed
Who Do I ask?

- accounting.ask@business.gatech.edu
  Expense / Encumbrance JE, Campus Service Unit JE
  Journal Entries
  Wire Transfer

- ap.ask@business.gatech.edu
  Trade or Service Vendor payment policy and procedures
  Request Payment Status
  Payments to Non-Residents
  Using the Check Request Form
  Processing Credit Memos

- gl.ask@business.gatech.edu
  Financial Reporting
  GL Security
  Ledger Postings

- risk.ask@business.gatech.edu
  Risk Management Issues

- pcard.ask@business.gatech.edu
  How to get a Pcard
  Pcard Policy and Procedures

- procurement.help@business.gatech.edu
  Submitting Purchasing Change Requests
  Using the PeopleSoft Procurement Application - functional, technical, or security.

- purchasing.ask@business.gatech.edu
  Purchasing Policy and Procedures for Trade or Service Vendors
  Contracts that require signature

- travel.ask@business.gatech.edu
  Policy and Procedures for Trade or Service Vendors
  Request Travel Payment Status
  Non Resident Travel

- vendor.help@business.gatech.edu
  Request New Vendor
  Provide additions, changes, deletions, to Vendor Information
  Vendor Information Lookup
7. Contract Administration

7.1 PURPOSE: To utilize a searchable electronic central repository for all suppliers Contracts in order to provide greater visibility, identify cost saving opportunities, better Understand existing obligations, uncover risk and improve compliance and tracking.

7.2 PROCESS: All pertinent contract information and documentation are entered into BuzzMart.

- This system allows the Contract Officers to electronically:
  - Maintain all information regarding vendor and contract
  - Record departmental reviews
  - Assess contractor’s performance and compliance
  - Notify renewal and termination

- The Contract Officer will also:
  - Meet with the contractor and department representative(s) to review the Performance on not less than an annual basis
  - Develop action items for improvement when needed.
  - Contracting Officer contacts the corresponding department for consideration for renewal.
  - Contracting Officer receives the department’s response to renew and sends a letter to the contractor requesting renewal
  - Contracting Officer receives contractor’s consent to renew and issues a Notice of Award Amendment (NOA).
  - NOA is sent to the contractor.

7.3 RESPONSIBILITY: Contracting Officers / Administrative Assistant / Department End Users / Vendors

7.4 FREQUENCY: As required
8. Delegated Authority

8.1 PURPOSE: To define the delegated authority dollar amount of the Institute, both at the individual unit and Purchasing Department levels.

8.2 PROCESS: The Purchasing Department has a delegated purchasing authority of $5,000,000 for conducting RFP’s and an unlimited dollar authority for other purchasing activities.

The Department of Administrative Services (DOAS) has delegated the purchase of the following commodities and services and purchases made with the following funding sources to Board of Regents institutions. This delegation is without a dollar limitation.


8.3 RESPONSIBILITY: Director of Purchasing, Contract Officer

8.4 FREQUENCY: As Needed
9. EDP Process

9.1 PURPOSE: Electronic Data Processing requirements and process

9.2 PROCESS: Electronic Data Processing (EDP) is required for some purchases of computer and computer related equipment, software, and services. The guidelines for EDP approval are found on the Office of Information (OIT) web site www.oit.gatech.edu/staff/edpoverview.cfm. Refer to these for EDP requirements. A copy of the EDP approval is required to be attached to requisitions when the criteria for EDP are met. The purchase requisition will not be processed by Purchasing until the EDP approval is received from the requesting department.

9.3 RESPONSIBILITY: Requesting Department Staff / Contracting Officer

9.4 FREQUENCY: As required
10. Emergency Purchase Process

10.1 PURPOSE: Provide policy to process emergency purchases that occur outside of normal business hours of operation.

10.2 PROCESS: Departments may purchase materials and/or supplies that are urgently needed as a result of unforeseen causes that occur outside of normal business hours of operation that impact the health, security, well-being or education of GT students and/or employees

- Department is required to inform Purchasing the next business day of such purchase(s) and provide written explanation as to the circumstances requiring such action.
- Submit a requisition for items ordered
- Provide all necessary paper work, quotations invoices, sole source justification and any other documentation required to process the requisition

10.3 RESPONSIBILITY: Contracting Officers / Department Finance Office Staff

10.4 FREQUENCY: As required
11. FAR Clauses/ Grant

11.1 PURPOSE: Procedure for ensuring that the correct documents and clauses are included in Purchase Order packages that utilize Federal funding.

11.2 PROCESS:
- Purchase Orders that utilize Federal Funding will require the Contract Officer to approve the Purchase Order in BuzzMart.
- The Contract Officer will look up the project number in GT Grants and Contract Accounting Web Wise System and determine if the project is a Federal Grant or Contract and if the project has a Defense Priority Rating.
- The Contract Officer will then determine what clauses need to be included on the Purchase Order and what certifications may be required prior to issuing the Purchase Order.

11.3 RESPONSIBILITY: Contracting Officers

11.4 FREQUENCY: As required
12. Forms

12.1 PURPOSE: Purchasing forms are standardized and stored electronically.

12.2 PROCESS: Procurement Services forms for campus use are located at http://www.procurement.gatech.edu/.  
- These forms are reviewed monthly for accuracy.  
- All forms are saved on the Purchasing “K” drive in the “Forms” folder.  
- DOAS State Purchasing forms are located at http://doas.ga.gov/StateLocal/SPD/Seven/Pages/Home.aspx

12.3 RESPONSIBILITY: Contracting Officers / Assistant Director

12.4 FREQUENCY: As required
13. Gifts of Equipment & In-Kind Contributions

13.1 PURPOSE: Gifts of property or equipment are more effectively handled by GIT. The Board of Regents (BOR) has delegated the acceptance of gifts of property (equipment and in-kind contributions) valued at $100,000 or less to the President of the Institute. However, acceptance of gifts of property in excess of $100,000 requires formal BOR approval.

13.2 PROCESS: Donations of in-kind gifts, such as instructional and research equipment, library books, and other library materials, should be made to GIT. The department receiving the gift is responsible for forwarding the gift information to Office of Development Gift Accounting (ODGA), at Mail Code 0182 using the Gift Transmittal Form (in Word97 format. Also see Adobe Acrobat form) and the In-kind Gift Report Form (in Word97 format. Also see Adobe Acrobat form).

If the gift is accepted, ODGA will acknowledge the gift and forward the gift information to the President's Office, Administration and Finance, and Accounting Services for recording in their database. A copy of the transmittal letter will be sent to the recipient department's unit head.

If the value of the gift is over $100,000, ODGA will forward the gift information to the Office of Financial Services. Financial Services will draft a letter from the Senior Vice President for Administration and Finance to the Senior Vice Chancellor for Capital Resources seeking Board of Regents (BOR) approval for the gift at the next scheduled Board meeting. Upon approval by the BOR, an approval letter is sent to Administration and Finance. Administration and Finance will then forward a copy of the approval letter to Financial Services, to the recipient department's unit head, and to ODGA. ODGA will acknowledge the gift and notify Accounting Services. Accounting Services will record the gift information in their database and provide Capital Asset Accounting with the appropriate information and documentation to "tag" the donated equipment.

The department/campus unit receiving the gift is responsible for ensuring that the entire gift pledged to GIT is actually received. If, for some reason, a portion of the gift is not received, the department should notify Accounting Services so that inventory valuation records may be updated reflecting the revised value of the gift. Accounting Services will notify the President's Office, Administration and Finance, and ODGA of the change.

http://www.admin-fin.gatech.edu/business/foundfunds/110013.html

13.3 RESPONSIBILITY:

13.4 FREQUENCY:

14.1 PURPOSE: Georgia Tech Purchasing is governed by various policies and procedures.

14.2 PROCESS:

- GT Purchasing is governed by the Board of Regents of the University System of Georgia. The University System of Georgia policy manual is located at: http://www.usg.edu/regents/policymanual/

- GT Purchasing is governed by the GT Finance Office policies and procedures which can be found at: http://www.admin-fin.gatech.edu/

- GT Purchasing is governed by the Purchasing Rules and Regulations of the Georgia Department of Administrative Services (DOAS). GT is in compliance with all DOAS purchase order, contract issuance, and approval procedures which can be found at: http://statepurchasing.doas.georgia.gov/vgn/images/portal/cit_11783501/37108101procurementmanual.pdf

14.3 RESPONSIBILITY: Director / Contracting Officers / Administrative Assistants / Department Finance Office Staff / Requesters / Approvers

14.4 FREQUENCY: As required
15. Installment Purchases

15.1 PURPOSE: Equipment can be purchased using installments payments.

15.2 PROCESS: Installment Purchases (IPA) are transactions where GT pays for items over a set period of time. The process for determining the actual product that will be procured is the same as any other procurement (i.e. bid, sole source, agency or state-wide contract). In all IPA’s the State of GA Standard Agency Agreement Installment Purchase/ Sale Financing will be completed. The financing entity must also attach an amortization schedule to this form if the payment schedule of the Standard Agency agreement is not used.

Leases or rentals are similar to the above IPA in that GIT is agreeing to a payment schedule over an extended period of time. However, at the end of the term GIT does not retain title to the equipment. In any event, prior to any lease being initiated the State of GA Standard Agency Agreement for Rental and Lease must be completed.

15.3 RESPONSIBILITY: Department End User / Contracting Officers

15.4 FREQUENCY: As required
STATE OF GEORGIA  
STANDARD AGENCY AGREEMENT  
INSTALLMENT PURCHASE/ SALE FINANCING  

Agreement between ________________________________, An Agency of the State of Georgia, as Vendee, hereinafter referred to as the User Agency, and ________________________________, as Vendor, hereinafter referred to as the Contractor, for the Installment Sale, of certain equipment. Subject to the terms and conditions set out below, the Contractor agrees to sell to the User Agency the following described equipment:

1. PAYMENTS

In consideration for the Installment Sale financing of the equipment covered herein, the User Agency shall pay to the Contractor for the equipment the sum of $_____________ per _________________ (month, quarter, year) as a portion of the payment price during the term of this agreement or any renewal hereof. A portion of each payment shall be allocated to interest as indicated on the attached contractor-provided amortization schedule which indicates payment, interest and principal balance.

2. TERM

This agreement shall begin on the date that the contract becomes effective and shall continue until the close of business of the then current fiscal year of the State of Georgia, unless renewed pursuant to paragraph #3.

3. OPTION TO RENEW

The User Agency is hereby granted _____ successive options to renew this agreement for additional terms of one fiscal year each (July 1 - June 30), and one final option to renew this agreement for a period sufficient to make the total extended term of this agreement ______ months, all upon the same terms and conditions, provided, that such options shall be exercisable solely and exclusively by the User Agency. Exercise of any such option shall be by the issuance of a Purchase Order Correction.

4. EARLY TERMINATION CHARGES

Except in the event indicated in paragraph #8, the payments set out herein are based upon the expectation of the parties that the User Agency will exercise all of the options to renew granted to it. In the event that the User Agency should fail to exercise all of said options to renew, it shall pay to the Contractor:

5. RETURN OF EQUIPMENT

The Contractor may, upon an early termination pursuant to paragraphs #4 and #15 or #16, enter the premises of the User Agency and remove the equipment. In the event of early termination after the passage of title to the User Agency, and without full payment of the outstanding balance of the purchase price being tendered by the User Agency to the Contractor, title shall be transferred to the Contractor pursuant to paragraph #7b.

6. INITIAL CONDITION OF EQUIPMENT

Any equipment leased or purchased hereunder shall be ____________________________ ("new", "remanufactured", "reconditioned", etc.).

7. TITLE

a. Unless otherwise set forth in paragraph #25, title to the equipment shall vest in the User Agency upon its acceptance of the equipment from the Contractor or from the third party as indicated in paragraph #24, subject to the terms and conditions of this agreement and the User Agency's obligation hereunder.

b. In the event that the User Agency does not fully consummate the sale by making full payment for
The equipment, title to the equipment shall be transferred to the Contractor by State Purchasing of the Department of Administrative Services acting on behalf of the User Agency.

8. TRANSFER OF TITLE

The User Agency shall have the option of fully paying for any equipment acquired by installment sale hereunder at any time during the term of this agreement or any renewal thereof or upon the expiration of the last renewal term of this agreement for a price equal to the principal balance after the most recent payment as shown on the attached vendor-provided amortization schedule. There shall be no prepayment penalties assessed for early payout.

9. TOTAL OBLIGATION

The total obligation which the User Agency may incur in the initial term of this agreement is $__________.

(Indicate the Installment Sale charges from the initial month of the agreement through the subsequent June 30)

The total obligation which the User Agency may incur in each renewal term is as follows:

<table>
<thead>
<tr>
<th>RENEWAL PERIOD</th>
<th>TOTAL DOLLAR OBLIGATION FOR PERIOD</th>
</tr>
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<tbody>
<tr>
<td>* First Renewal:</td>
<td>$</td>
</tr>
<tr>
<td>* Second Renewal:</td>
<td>$</td>
</tr>
<tr>
<td>* Third Renewal:</td>
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<tr>
<td>* Fourth Renewal:</td>
<td>$</td>
</tr>
<tr>
<td>* Fifth Renewal:</td>
<td>$</td>
</tr>
</tbody>
</table>

* The initial and subsequent renewals of the contract are determined by the State of Georgia=s fiscal year (July 1-June 30 of the subsequent year). The final renewal may be less than one year.

10. DELIVERY

Shipping and delivery costs, if any, shall be borne by _________________________________________________ ("Contractor" or "User Agency"), such costs not to exceed $____________________________. (If shipping and delivery are to be paid by the User Agency, enter an exact or $ shall not exceed amount; if such charges are not applicable or are to be paid by the contractor, indicate ANot Applicable=")

11. INSTALLATION

The Contractor shall install the equipment at the location designated by the User Agency. Installation costs shall be borne by the ________________________ ("Contractor" or "User Agency"), such costs not to exceed $__________________________. (If installation charges are to be paid by the User Agency, indicate an exact or $ shall not exceed amount; if such charges are not applicable or are to be paid by the Contractor, indicate ANot Applicable=")

12. REPAIRS AND MAINTENANCE

Unless otherwise stated in paragraph #25, the Contractor shall maintain the equipment in good working order and will make all necessary adjustments and repairs. For this purpose the Contractor shall have full and free access to the equipment. The charge for such maintenance is included in the payment set out in paragraph #1.

13. TAXES

The User Agency will forthwith pay all taxes lawfully imposed upon it with respect to the equipment or this agreement. The Contractor will forthwith pay all taxes lawfully imposed upon it with respect to the equipment or this agreement. By this section, the User Agency makes no representation whatsoever as the liability or exemption from liability of the Contractor to any tax imposed by any governmental entity.
14. **RISK OF LOSS**

The User Agency shall assume all risk of loss of the equipment at all times during the term of this agreement or any renewal thereof. From the time that title to the equipment vests in the User Agency until this agreement is terminated, the User Agency shall procure and maintain fire and extended coverage insurance on the equipment through the State of Georgia, insuring the full insurable value against risk of loss or damage, providing a minimum of ten (10) days written notice of change or cancellation to the contractor. This agreement does not provide for or require insurance coverage for bodily injury or property damage to others.

15. **PATENTS**

Contractor shall, at its expense, be entitled to and shall have the duty to participate in the defense of any suit instituted against the User Agency and indemnify the User Agency against any award of damages and costs made against the User Agency by a final judgment of a court of last resort in such suit insofar as the same is based on any claim that any of the equipment constitutes an infringement of any United States Letters Patent; provided the User Agency gives the Contractor immediate notice in writing of the institution of such suit, permits the Contractor to fully participate in the defense of the same and gives the Contractor all available information, assistance and authority to enable the Contractor to do so. The Contractor shall not be liable for any award of judgment against the User Agency reached by compromise or settlement unless the Contractor accepts the compromise or settlement. The Contractor shall have the right to enter into negotiations for and the right to effect settlement or compromise of any such action, but no such settlement shall be binding upon the User Agency unless approved by the Agency.

In case any of the equipment is in any suit held to constitute infringement and its use is enjoined, the Contractor shall, at its option and expense (1) procure for the User Agency the right to continue using the equipment; or (2) replace or modify the same so that it becomes non-infringing; or (3) remove the same and cancel any future charges pertaining thereto. The Contractor, however, shall have no liability to the User Agency if any such patent infringement or claim thereof is based upon or arises out of; (1) compliance with designs, plans or specifications furnished by or on behalf of the User Agency as to the equipment; or (2) the use of the equipment in combination with apparatus or devices not supplied by the Contractor; or (3) the use of equipment in a manner for which the same was neither designed or contemplated; or (4) the claimed infringement of any patent in which the User Agency or any affiliate or subsidiary of the User Agency had any direct interest by license or otherwise. The foregoing states the entire liability of the Contractor for or resulting from patent infringement or claim thereof.

16. **DEFAULT**

Upon the failure of the User Agency to make any payment when due, or upon the failure of the User Agency to perform any other obligation imposed upon it by this agreement and upon the continuance of such failure after the receipt of written notice thereof from the Contractor, the User Agency shall be deemed to be in default hereunder. Upon the occurrence of any such default, the Contractor shall have the right, in addition to any other legal remedy available to it, to enter the User Agency's premises and remove the equipment.

17. **FUNDING**

Notwithstanding any other provision of this agreement, the parties hereto agree that the charges hereunder are payable by the User Agency solely from appropriations received by the General Assembly of the State of Georgia. In the event such appropriations are determined in the sole discretion of the chief operating officer of the User Agency no longer to exist or to be insufficient with respect to the charges payable hereunder, this agreement shall terminate without further obligation of the User Agency as of that moment (hereinafter referred to as "Event"). In such Event, the chief operating officer of the User Agency shall certify to the Contractor the occurrence thereof, and such certification shall be conclusive. In the event of the User Agency's certification, the User Agency agrees not to replace before the end of the fiscal year in which the Event occurs or before the expiration of this agreement, whichever occurs first, the equipment covered hereunder with equipment obtained from another contractor at the same or higher annual cost to the User Agency.
18. ASSIGNMENT
The Contractor may, with the prior approval of the User Agency, assign its right to receive payments hereunder, provided, that such assignment shall not relieve the Contractor of its responsibility to perform any duty imposed upon it herein.

19. SEVERABILITY
This agreement embodies the entire agreement between the parties. It may not be modified or terminated except as provided herein by other written consent. If any provision herein is held to be invalid, it shall be considered deleted here from and shall not invalidate the remaining provisions.

20. CHOICE OF LAW
This agreement shall be governed in all respects by the laws of the State of Georgia.

21. GENERAL
a. The provisions of the Georgia Vendor Manual are incorporated herein by reference and made a part hereof as if it had been fully set out herein. Provided, however, that in the event of a conflict between the terms and conditions contained therein and the terms and conditions of this agreement, the latter shall be controlling.

b. The terms, conditions and specifications of the Request for Proposal or Request for Quote, if any, and/or any award made in connection with this transaction are incorporated herein by reference and made a part hereof just as if they had been fully set out herein.

c. Items covered herein are exempt from Federal Excise Tax and from Georgia Sales and Use Tax.

22. DRUG-FREE WORKPLACE
a. If Contractor is an individual, he or she hereby certifies that he or she will not engage in the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana during the performance of this contract.

b. If Contractor is an entity other than an individual, it hereby certifies that:
(1) A drug-free workplace will be provided for the Contractor's employees during the performance of this contract; and

(2) It will secure from any subcontractor hired to work in a drug-free workplace the following written certification: 'As part of the subcontracting agreement with (Contractor's Name), (Subcontractor's Name), certifies to the Contractor that a drug-free workplace will be provided for the subcontractor's employees during the performance of this contract pursuant to paragraph 7 of subsection B of Code Section 50-24-3.'

c. Contractor may be suspended, terminated, or debarred if it is determined that:

(1) The Contractor has made false certification hereinabove; or

(2) The Contractor has violated such certification by failure to carry out the requirements of Official Code of Georgia Section 50-24-3."

23. AMORTIZATION SCHEDULE

Contractor shall supply an amortization schedule prior to the effective date of this contract. The amortization schedule shall be incorporated into the terms and conditions of this contract.

24. THIRD PARTY PAYMENT

Unless the Contractor is the party providing the equipment to the User Agency, payment for the purchase of the equipment in the amount of $____________ shall be made to the following:

Such payment shall not be made until the Contractor has received written notification by the User Agency that the equipment referenced has been received and accepted.

25. SPECIAL INSTRUCTIONS

The following Special Instructions shall be in addition to the foregoing terms and conditions:

This agreement shall be executed on behalf of the User Agency by the issuance, by State Purchasing of the Department of Administrative Services, of a Purchase Order or by the issuance by the User Agency of a Field Purchase Order referencing same.

In the event this agreement is entered into as the result of a competitive bid, the following paragraph shall be deemed to be applicable.

"I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud. I understand that collusive bidding is a violation of State and Federal law and can result in fines, prison sentences, and civil damage awards. I agree to abide by all conditions of this bid, and certify that I am authorized to sign this bid for the bidder (O.C.G.A. 50-5-67). I further certify that the provisions of the Official Code of Georgia Annotated 45-10-20 et. seq. have not and will not be violated in any respect."

Accepted and executed this __________ day of ______________________, ________.

CONTRACTOR: _________________________________________________________

BY: __________________________________________________________________

(Authorized Signature)
16. Insurance Requirements

16.1 PURPOSE: A vendor must meet certain minimum insurance requirements when providing good or services

16.2 PROCESS: Insurance requirements include:

There are standard insurance requirements for procurements established by DOAS.

These requirements are altered as the assessment of risk varies in conjunction with the provision of the vendor’s service or product. Requirement of a certificate of insurance with the purchase of product is a rarity, but could arise. (Install during construction)

Contracting Officers perform an assessment of the risk involved. When the insurance requirements are sufficient the Contracting Officer proceeds with these requirements.

Contracting Officer brings to the attention of the Risk Manager those that appear to require additional terms or increased dollar value insurance requirements

The Risk Manager evaluates and makes the assessment on requests that may have more risk involved and returns the revised document to the Contracting Officer.

Vendor’s provision of a certificate of insurance is required in advance of vendor’s performance.

Certificates of insurance are to be made out as follows:
   Georgia Institute of Technology and the Board of Regents
   711 Marietta St.
   Atlanta, GA 30332

16.3 RESPONSIBILITY: Contracting Officers / Risk Manager

16.4 FREQUENCY: As required
17. Price Reasonableness (ONR Suggested Methods)

17.1 PURPOSE: To detail price reasonableness on sole source justification using approved ONR regulations.

17.2 PROCESS:
University purchasing agents or buyers are the primary personnel who make decisions on behalf of the university with respect to the purchase of goods and services needed by the university community. Frequently, these purchases involve the expenditure of federal and state provided funds and sponsored funds. In all cases, a main consideration is to assure that the price to be paid for these goods and services is fair and reasonable. This is essential to ensure that both the university and government funds are utilized in a cost effective manner and to conserve funding where resources are limited.

The most basic reason for requiring that price or cost analyses be performed and documented is that it is a sound business practice. This, as noted above, ensures that funds are expended in the most cost effective manner and conserves limited resources. A price which is excessive or unreasonable fails completely to accomplish this important goal; a price which is determined to be fair and reasonable is the fulfillment of this important objective.

Equally important is that performing and documenting that prices to be paid are fair and reasonable is a requirement when expending or using federal funds for the purchase of required goods and services.

In simple terms, a price analysis is a review, analysis or examination of the price proposed by a vendor and an assessment or evaluation as to whether or not it is fair and reasonable. A determination that a price is fair and reasonable is really a conclusion that the proposed price is fair to both parties, considering the quality and delivery and other factors. The basis for reaching that conclusion is found in the facts and information considered and analyzed by the buyer. This is what is called price analysis.

First, a cost analysis is different from price analysis. The major difference is that a price analysis looks at the whole price. It does not involve an examination of the individual cost elements or components which collectively comprise the seller’s price.

A cost analysis, on the other hand, actually examines the individual cost elements which comprise the total proposed price. Depending on the purchase, these elements may vary but generally include such things as labor rates, material cost, expenses (G&A) and a profit or fee.

In performing a price analysis, that is, determining a price to be fair and reasonable without examining the individual components of the price, a buyer has a wide selection of methods. Which method is used and its suitability depends on the facts or information of the individual purchases. What follows is a listing of the most common methods or criteria used to determine a price fair and reasonable by price analysis.

**PRICE COMPETITION:** When two or more acceptable offers are received and the lowest price is selected, the price of the lowest offeror can be concluded to be fair and
reasonable. It is noted that generally where the difference in prices between the two offers ranges up 15%, the price competition is said to exist. A price which is very low must be checked to assure that the seller understands what he is selling and has made no errors. Example: Seller A proposes a price of $2,592.00; Seller B, a price of $2,550.00 and Seller C, a price of $1,400.00. Seller C is proposing the same item and has made no errors in his/her pricing. If selection is made to other than the low, acceptable offer, the price must be determined to be fair and reasonable by other means.

**CATALOG OR ESTABLISHED PRICE LIST:** Where only one offer is received and the seller has a published or established price list or catalog which sets forth the price of a commercial item, this fact can be used to find the price fair and reasonable. The catalog should be current (within one year, generally). It is a good idea to obtain a name of another recent purchaser and confirm that this was the price paid. Often, discounts off of the price list are offered. If this is the case, it should be noted in the written analysis. The item to be purchased should generally be a commercially produced one sold to the general public in substantial quantities.

**GSA CONTRACTS OR PRICING AGREEMENTS:** The federal government often enters into contracts with various companies as to the prices of items which will be sold to the government. These are presumed to be fair and reasonable. If a seller cites a GSA contract price, that is adequate to determine the price fair and reasonable. The actual price may be lower than the GSA due to discounts; if this is the case, it should be noted in the written analysis.

**PRICE BASED ON PRIOR COMPETITION:** It may be that only one seller will propose. If this is the case and the item was previously purchased on competition, this may be acceptable. In such cases, you want to cite the price of the prior purchase and note if it was competitive or based on catalog price or other means. An increase in price, with no current catalog or competition, should be about the current rate of inflation, 4% to 6%.

**COMPARISON TO A SUBSTANTIALLY SIMILAR ITEM:** Often an item is very similar to a commercial one but has added features which are required. If the Seller can provide the price of the base item, by a catalog, and then state cost of the additional features, the buyer can then find the price reasonable based on these two factors. The reasonableness of the extra cost can be checked from other purchases that had the extras or some of them or based on an evaluation of the extra cost by technical personnel.

**SALES OF THE SAME ITEM TO OTHER PURCHASERS:** If the seller has no catalog but has sold the same item to others in the recent past, the price can be determined to be fair and reasonable by verifying with those other purchasers what price they paid. This must be noted in the written documentation with name, telephone and date of confirmation.

**COMPARISON TO PRICES WITH OTHER SIMILAR ITEMS:** If an item is generic, there may be a number of similar made products, such as computers. If the low price for a computer is $1,800.00, then a call to another firm asking for a price on a similarly configured machine can be used. Say the other is $1,925.00, that can be used.
MARKET PRICES: Where an item has an established market price, verification of an equal or lower price also establishes the price to be fair and reasonable. Example, the purchase of metals, such as lead, gold, silver or commodities, such as grains.

HISTORICAL PRICES: If the buyer has a history of the purchase of the item over several years, use of this information, taking into account inflation factors, can be used to determine a price fair and reasonable.

INDEPENDENT UNIVERSITY ESTIMATE: If an independent estimate of the item has been prepared and other methods or information is available, a price can be compared to the estimate and if it compares favorably, this can be a basis to find a price fair and reasonable. The estimate, however, must be independent. Use of a seller’s pricing to make an independent estimate is NOT independent.

COST ANALYSIS: A cost analysis looks at the individual elements of the price and analyzes these. Overhead or indirect rates may be verified and found reasonable by verifying such rates with the government, in many cases. The number of hours proposed, not the price, should be evaluated by the technical or scientific folks. The reasonableness of the percent of fee or profit is the responsibility of the buyer. It is negotiable in most cases. An asking price is not always a taking price.

DOCUMENTATION: Each price analysis or cost analysis must be documented in writing by the buyer.

17.3 RESPONSIBILITY: Requester, Approver / Department End User / Contract Officers

17.4 FREQUENCY: As required
18. Procurement Contract Officer Duties

18.1 PURPOSE: Duties and responsibilities have been delegated to the Procurement Contracting Officer

18.2 PROCESS: The duties and responsibilities include:

- Identify, develop, negotiate and administer strategic agency contracts
- Administer complex high dollar procurements while meeting all federal, state guidelines
- Administer and process Request for Proposal and Requests for Information
- Interface with campus end-users to complete transactions
- Interact with vendors

18.3 RESPONSIBILITY: Contract Officers

18.4 FREQUENCY: As required
19. Purchase Order (PO)

19.1 PURPOSE: Requisitions that total $2500.00 and greater and are not generated from an electronic catalog require processing through the Purchasing Department to create a Purchase Order using the BuzzMart.

19.2 PROCESS:

- Creating the requisition
  - All requisitions are created and electronically approved using BuzzMart.
  - If the vendor is not in the vendor database, complete the “Request New Vendor” window.
  - All new vendors are required to submit a Vendor Profile to the vendor maintenance administrator.
  - The form can be found at:

http://procurementprd.gatech.edu/forms

- Approving the requisition
  - It is the responsibility of the approver to audit the requisition to ensure it is accurate and complete
  - Pay special attention to include the correct account and that it matches the category
  - You can research project and account numbers at http://www.procurement.gatech.edu/mm_report.html
  - It is the responsibility of the approver to ensure that all required attachments are forwarded to the attention of the Contract Officer in the Purchasing Department

- Assigning Requisition to Contract Officer
  - The requisitions are automatically assigned to a Contract Officer by NIGP code

- Processing the Requisition into a Purchase Order
  - Purchase Order numbers are generated by the system
    - End-users cannot create a PO number. All PO numbers are generated by the BuzzMart system
    - The BuzzMart system prohibits duplication of Requisition/PO numbers
  - State Contract items
    - Verify price/quote, specifications, vendor, terms, contract number
  - Sole source items
    - Verify prices, specifications, vendor, terms, sole source justification, price reasonableness, vendor sole source documentation
  - Bid/RFQ (Request for Quote)
    - Verify specifications
    - Determine vendors based on state and federal requirements
    - Bid posted on state registry
    - Responses received, analyzed, recorded, awarded
- Vendor selected on requisition by contract officer
  - Any deviation from GT procurement procedures is documented by the Contracting Officer on the Purchasing Checklist which is filed with each PO package. The requester and approver are notified by the contracting officer of any deviations and how the order was processed.
  - The Contract Officer is responsible for verifying costs and expenditures using sponsored funds are permitted in the grant or contract agreements by accessing the OSP website (WEBWISE).

- Dispatching PO
  - After completing and reviewing the requisition, the Contract Officer will approve the requisition.
  - A PO is dispatched to the vendor and campus department by the Purchasing Department
  - Purchase Orders are dispatched on a nightly basis via fax server
  - The BuzzMart Purchase Order (PO) is the only official Georgia Tech purchase order.

- Change Requests
  - Change requests are entered electronically and routed to the support team.
  - All changes to POs greater than $5,000 processed by a contract officer are routed to them for approval prior to the change
  - The contract officer will review the contract/agreement/PO to ensure that no inappropriate changes are made
  - The contract officer will approve/reject the change noting the justification and initial the hard copy of the change request and return it to the support team.

19.3 RESPONSIBILITY: Contract Officers / Approver / Requester / Associate Director / Director

19.4 FREQUENCY: As required
20. Purchasing Goods/Services on Contract

20.1 See Policy Manual Policies 5.2 and 5.3

20.2 PROCESS
20.3 RESPONSIBILITY: Director
20.4 FREQUENCY: As required
21. Reports

21.1 PURPOSE: To retrieve various information and data as it relates to purchasing and accounts payable. Some reports are created and tailored to fit and serve a specific area of the procurement department.

21.2 PROCESS: Purchasing Reports

- Open Encumbrance Report
  - Run in Peoplesoft by the support team and by Department Finance Office staff.
  - Used to:
    - Check the numerical sequence of purchase orders
    - Validate open encumbrances and to release encumbrances of closed orders. Department Finance Office staff must submit written justification to support open encumbrance
    - Open Encumbrance reports are reviewed by support team supervisor and Associate Director
  - Reviewed monthly and ad hoc as needed

- The Department Finance Office staff should compare each open encumbrance on the report with the related Purchase Order, all packing slips and all paid invoices to identify if the encumbrance is open because of incomplete shipments. The Business Finance Officer should contract the vendor to follow-up on any partial shipments. If the full order cannot be delivered, then the Business Finance Officer should submit a Purchase Order Change Request. An updated Purchase Order will be sent to the vendor and the unused funds will be unencumbered.

- Fiscal Year Close Out Memorandum and Chronological Calendar
  - Distributed by the Associate Vice President of Financial Services
  - Notifies campus of formal cut-off date for fiscal year-end purchases as June 30 of each year

21.3 RESPONSIBILITY: Director / Contracting Officers / Administrative Assistants

21.4 FREQUENCY: As required
22. Signature Authority

22.1 PURPOSE: To provide a list of GT employees who are authorized to sign agreements and contracts which commits state and federal monies to be spent on goods and services.

22.2 PROCESS: Only the President of the Institute can delegate signature authority. The Purchasing Department maintains a list of who has authority to sign agreements and contracts, date authorized and the level in which authority is given.

22.3 RESPONSIBILITY: Director / President’s Office

22.4 FREQUENCY: As authority is delegated
23. Sole Source Processing

23.1 PURPOSE: Establish criteria for “sole source” procurements.

23.2 PROCESS:

- Sole Sources are processed when the criteria set forth by DOAS Purchasing for a “sole source” is met—reference their APM for Sole Source. Reference http://www.usg.edu/fiscal_affairs/bpm_acct/bpm-sect03.pdf
- Also reference Procurement Services website http://www.procurement.gatech.edu/ to view the appropriate form along with instructions on how to complete a request form for “sole source”.
- It is also required to post sole source procurements greater than $25,000 to the Georgia Procurement Registry for a minimum of three business days prior to issuing a purchase order. If other vendors see the posting and demonstrate they can supply the goods/services as specified, then a bid may be required instead of the sole source procurement.
- Emergency purchases, technical (research) instruments and supplies are exempt, as are some professional services.
  o governmental agencies
  o technical instruments
  o technical supplies
  o technical books and printed matter
  o personal employment services
  o professional services (as listed in GPM)
  o construction/public works contracts
  o textbooks
- Approval of a “sole source” request is twofold:
  o Contracting Officer approves the department’s request
  o Contracting Officer obtains verification from the vendor that they are the only source available to provide the requested item(s) or service.

23.3 RESPONSIBILITY: Contracting Officers

23.4 FREQUENCY: As needed
SOLE SOURCE / SOLE BRAND JUSTIFICATION

<table>
<thead>
<tr>
<th>REQUISITION #</th>
<th>DATE</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>☐ SOLE SOURCE</td>
<td>☐ SOLE BRAND</td>
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</table>

- This product DOES contain Radioactive material and IS capable Of producing X-Rays.
- This product DOES contain Class 3b or 4 lasers.
- This product DOES contain any Explosives, pyrophoric or highly Toxic gases.
- If required, written approval has been received from EH&S for this purchase.

1. **Proposed Source:**
   - Contact Name:
   - Telephone No.: Fax No.:
   - Email:

2. **Scope of Work:** (Describe what the item/service is and how it is to be used)
   
   If the requested product is an integral part or accessory compatible with existing equipment please provide:
   - Existing equipment
     - Manufacturer
     - Model/Serial #
     - GIT #
     - Dollar Value

3. **Exclusive Capability:** (Describe proposed source’s unique capabilities and/or personnel to perform this work, and why this is the only source available.) **Sole Source Only Request**
   
   State any extenuating circumstances or considerations

4. **Sole Brand Justification:**

5. **Price Analysis:**
   - Comparable item/service Vendor Cost
   - Comparable item/service Vendor Cost
   - Current price list attached (highlight items) GSA contract price

Date __________ Sole Source/Brand
Approved _____________________ Contract Officer
24. Specification Criteria

24.1 PURPOSE: Provide standards for preparing specifications

24.2 PROCESS: Preparing specifications involve four major considerations which include:
- design consideration of function
- manufacturing consideration of economical production
- procurement consideration of market, material accountability, supplies capabilities
- cost

An effective specification should
- identify minimum requirements
- allow for competitive bids
- list reproducible test methods to be used in testing for compliance with specifications
- provide for an equitable award at the lowest possible cost

Performance Specifications:
- rely on how a product is made rather than what it does
- the use of physical divisions to describe the product
- group terms such as type, class, and composition should be used to designate items
- design specifications tend to restrict competition

Combination of Performance and Design Specifications
- effectively utilizes characteristics of both major specification types

Alternative Specifications
- use of Brand or Trade names of a specific manufacturer
- qualified products list maintained by agency that meets established specifications
- Samples: may be required to be submitted with bid specifications for comparison and in testing in order to assure compliance with general or detailed specifications

Bidder Response Forms: provide bidders an opportunity to respond to individual requirements
- supporting data to be furnished with bid such as vendor catalog pages and or product specification sheet

24.3 RESPONSIBILITY: Procurement Contracting Officers / DOAS

24.4 FREQUENCY: As required

25. Telephone Vendor Confirmation
25.1 PURPOSE: To verify that a vendor is the sole source manufacturer of a product or service

25.2 PROCESS:

The following is ONR response

Date: Wed, 6 Aug 2008 12:20:59 -0400
Message-ID: <198AE6B38B23724781761CC7C0B5D90701C02E01@onrex3.onr.navy.mil>
From: "Lopolito, Gina" <lopolig@ONR.NAVY.MIL>
To: "Judy Whitfield" <judy.whitfield@business.gatech.edu>

Judy,

The documentation to support a procurement under a federally sponsored program should always be commensurate with the value of the award. I agree that as long as you record the name and number of the person you spoke with at the vendor who told you they are the only source for a particular product, that it should suffice for most sole source awards for goods. I would expect that you could use past history as well where you've used the vendor in the past and they have provided written concurrence that they are the only distributor of a product, etc. You can also check the internet websites for these companies to see what information they present to the public. For high value procurements, in excess of the simplified acquisition threshold (currently at $100,000), for internal control purposes, more substantiation may be desirable.

Gina Lopolito
ONR CPSR Manager
E&SRB
495 Summer Street
Room 621
Boston, MA 02210
617-753-3258

25.3 RESPONSIBILITY: Contract Officers
If the contract officer would complete the top part, attach to an email to Marjorie, she can call and get the info and send it back to you. If it's faster for you to do it yourself, that's fine, too. Sole source over $100K should have written vendor verification rather than phone. – JW

25.4 FREQUENCY: As Needed
TELEPHONE VENDOR CONFIRMATION

Requisition # _____________________________

Quote # _________________________________

Vendor name _____________________________

Vendor contact ___________________________

Vendor contact title ________________________

Vendor contact phone number _________________________

Are you the manufacturer of the requested goods/services  □ YES  □ NO

Do you have resellers/distributors of these goods/services  □ YES  □ NO

Are the prices current as listed in quote  □ YES  □ NO

Will you accept NET 30 and FOB destination  □ YES  □ NO

What is the expected delivery date _________________________

Web site or electronic catalog address _________________________

Contacted by _________________________________

Title _________________________________________

Date _________________________________________
26. Trade-In Processing

26.1 PURPOSE: Properly document all transactions that include the trade-in of GT assets

26.2 PROCESS: When the requesting department wants to make a purchase where GT assets are going to be traded-in as part of the purchase transaction, the requesting department must complete the required sections of the Trade-in Allowance form and send this in with all of the other documentation for that particular order. The Contracting Officer must then sign and complete the required portion of the form and submit it to Capital Assets Accounting. CAD will then sign and complete their portion of the form and retain a copy for their records. The Contracting Officer is responsible for ensuring that a copy of the Trade-in allowance form is kept with the rest of the PO package.

26.3 RESPONSIBILITY: Requesting Department, Contracting Officer, CAD

26.4 FREQUENCY: As required
TO: Capital Assets Accounting Department (CAAD)  
MAIL CODE 0303  

Department: _________________________________

Permission is requested to trade in the equipment listed below.  

<table>
<thead>
<tr>
<th>Inventory No.</th>
<th>Description</th>
<th>Serial No.</th>
<th>Model No.</th>
<th>Condition*</th>
<th>Acq. Date</th>
<th>cost</th>
</tr>
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*CONDITION:
G = Good - Functionally operational, little or no repair required.
F = Fair - Limited repairs not over 25% of acquisition cost required.
P = Poor - Necessary repairs exceed 25% of acquisition cost.

A trade-in allowance of $__________________ is offered on the above listed equipment toward the purchase of the following:

Description:

____________________________________________________________________________________

Price of new equipment: $__________________

Campus Ref No. __________________________ P/S Project __________________________ Account __________________________

We believe this trade-in to be in the best interest of the State and this Institute.

Signed: ___________________________  Date: __________________________

Department Head

Department: _________________________________

____________________________

FOR USE BY OTHER DEPARTMENTS ONLY

<table>
<thead>
<tr>
<th>Purchasing Department:</th>
<th>CAAD:</th>
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</thead>
<tbody>
<tr>
<td>Approved ( )</td>
<td>Approved ( )</td>
</tr>
<tr>
<td>Denied ( ) Reason: _______________</td>
<td>Denied ( ) Reason: _______________</td>
</tr>
</tbody>
</table>

Signed: ___________________________  Signed: ___________________________
27. Unauthorized Purchase

27.1 PURPOSE: To provide a plan for handling unauthorized purchases over $10,000.00.

27.2 PROCESS:
- The requisition comes over Purchasing take Action referencing an invoice number or is determined that a purchase has been made.
- Request a e-mail from the requestor indicating the reason for the unauthorized purchase and what their plans are to insure that it will not happen in the future.
- The contracting will then add the written statement to the file along with making notation on the Check List
- The Contracting Officer will than go ahead and approve and process order.

27.3 RESPONSIBILITY: Support Team / Associate Director / Contracting Officers

27.4 FREQUENCY: Daily
28. Procurement of Exempt Goods and Services

28.1 PURPOSE: The procedure for procurement of goods and services that are exempt from DOAS rules and regulations

28.2 PROCESS:

- The requestor or contract officer should consult the Georgia Procurement Manual and DOAS website to verify whether the technical/statutorily exempt goods/services or specific NIGP codes are exempt from DOAS rules and regulations. The list of exempt NIGP codes can be found at: [http://doas.ga.gov/StateLocal/SPD/Docs_SPD_General/NIGPExemptList.pdf](http://doas.ga.gov/StateLocal/SPD/Docs_SPD_General/NIGPExemptList.pdf)
- If a purchase is exempt, the requestor and/or contract officer should follow best business practices to procure the goods or services. If practical, and at the contract officer’s discretion, it is recommended that a competitive solicitation be conducted to ensure the best value is obtained for the institute.
- If a solicitation (RFP/RFQ) is conducted, it is recommended that the following procedure is followed for the solicitation:
  - A solicitation document is generated that at a minimum provides the specifications of the goods/services being purchased, award criteria and minimum qualifications of the vendors. For RFP’s the evaluation criteria should also be provided.
  - While public notice of the solicitation is not required (as this is an exempt purchase), it is recommended that all solicitations over $200,000 are noticed in a public forum.
  - Vendor’s responses to the solicitation may be received electronically or in hard copy.
  - The responses received should be reviewed and evaluated by the requestor to ensure compliance with all the minimum requirements of the solicitation
    - For RFP’s, multiple (minimum of two (2)) evaluators are recommended. However, for RFP’s greater than $200,000 it is recommended that multiple evaluators are utilized. At the contract officer’s discretion, Evaluators may be allowed to score only specific sections of the RFP, the entire RFP individually or the entire RFP as a team.
  - Once an award recommendation has been made, all vendors that submitted responses must be notified in writing of the award recommendation.
  - If a vendor wished to protest the award recommendation, they must submit this in writing to the Director of Purchasing no later than 72 hours after the award notification was made. This letter must provide detailed information of the basis of the protest and a proposed remedy.
  - Once the award recommendation has been issued, the contract officer may open contract negotiations with the recommended awardee.
Contracts cannot be executed until Once contracts are executed, the contract officer shall maintain copies electronically.

28.3 RESPONSIBILITY: Director of Purchasing

28.4 FREQUENCY: As needed
29. Vendor Development

29.1 PURPOSE: Provide a means for vendors to do business with Georgia Tech

29.2 PROCESS:

1. Vendors are encouraged to meet with Contracting Officers.
4. Check with the Governor’s Small Business Center http://www.georgia.org/gsbc/index.html to find out if they qualify for a “small” or “minority” status.
5. We also encourage vendors to become certified with the Small Business Administration (SBA) when applicable.
6. We refer them to the following for assistance when it appears they may qualify as a “minority” source.

Georgia Minority Procurement Assistance Center

- Telephone: 478-953-3155 (toll free 888-272-2104)
- Fax: 478-953-3169
- Email: gtpac@edi.gatech.edu

Georgia Minority Business Development Center

- Telephone: 404-894-2096
- Fax: 404-894-1192
- Email: georgiambdc@edi.gatech.edu

8. Contracting Officers attend periodically vendor seminars and provide GT exhibits where there is an exchange of information concerning the GT procurement process and we provide possible GT department contact sources.

29.3 RESPONSIBILITY: Contracting Officers

29.4 FREQUENCY: As Needed

28. Vehicle Orders
28.1 PURPOSE: The procedure for placing orders for all vehicles, including GEM cars and Club cars.

28.2 PROCESS:

- The requestor completes the Vehicle Purchase Request Form found on the Procurement Services forms bank at http://www.procurement.gatech.edu/mm_forms.html and submits via email or fax to Patti Stilson, GT Motorpool, at Patti.stilson@facilities.gatech.edu fax: 404 894-6203.
- The request will be entered into the vehicle request system and sent to DOAS Fleet Management for approval.
- Once an approval is received from DOAS Fleet Management, an email will be sent to the requesting department with the Vehicle Request (VR) number.
- The requester will create a Purchasing Take Action requisition including the following:
  - The vehicle information, quote number, etc. in the description area.
  - The Vehicle Request (VR) number in the line comments section.
  - Delivery address should always be the GT Motorpool.
  - Do not approve the requisition at this point. Save the requisition.
- Once the requisition is completed, send an email to Patti.stilson@facilities.gatech.edu with the Vehicle Request (VR) number in the Subject and the requisition number in the body of your email. If faxing follow the same format.
- The requisition number will be entered into the vehicle request system and sent to DOAS Fleet Management for PO approval.
- Once an approval is received a final email will be sent to the requesting department indicating that the purchase is approved.
- The requester should now change the requisition from Open status to Approved status and save.
- Send the final email of approval and the quote to the assigned Contract Officer
- The Contract Officer will process the requisition and dispatch the PO to the vendor
- The department will be notified by Patti Stilson in the Motorpool when the vehicle has arrived.

28.3 RESPONSIBILITY: Contracting Officer

28.4 FREQUENCY: As needed