



Administrative Policy

| Title: Purchasing Policy & Procedures Manual | | | | |
|--|------------|---------------|---|---|
| Administered By: Finance Department (Purchasing) | | | | |
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The document titled as follows, which has been adopted as an Administrative Policy with the Policy Number noted above, has been revised as of the date noted above and below:

Purchasing Policy and Procedures Manual
(09/29/2025, Effective 10/03/2025)

The latest version of this Policy document is attached hereto and incorporated herein by reference.

Attachment: Policy #01300.001
 Issued 01/07/2012
 Revised 09/29/2025, Effective 10/03/2025



PURCHASING POLICIES AND PROCEDURES MANUAL

Prepared in accordance with the regulations of Chapter 3.08
of the Corona Municipal Code
As amended and approved by the City Council
Effective Date October 3, 2025 (Ord 3419)

Recommended by: DocuSigned by:


Kim Sitton, Finance Director 8E07A4980B094E7... Date: 9/25/2025

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1.0 GENERAL PURCHASING MANUAL PURPOSE AND INFORMATION

1.1 Introduction and Purpose

[Corona Municipal Code \(CMC\) Chapter 3.08](#) “Purchasing Regulations” provides for the administration of the general purchasing regulations, policies, and procedures. Purchases and agreements for goods and services made on behalf of the City shall be made within the City’s guidelines, procurement laws and regulations, and with the highest ethical standards, including appropriate stewardship of the City’s resources when procuring goods and services.

This City of Corona Purchasing Policies and Procedures Manual (“Manual”) is developed to be a working document , establishing guidelines, defining standard procedures, and clarifying issues relevant to the purchasing function.

The goals and objectives of this Manual are:

- To ensure compliance with all current laws and regulations;
- To promote transparency of the City’s procurement activities;
- To establish standardized cost-effective purchasing methods;
- To ensure continuity of City operations;
- To promote fair and competitive processes with integrity;
- To support the City’s mission and serve the best interest of the public; and
- To help employees understand the process.

When conducting City business, it is every employee’s responsibility to follow good business and ethical practices and to adhere to federal and state laws and regulations, as well as applicable City policies and procedures. In accordance with the Political Reform Act of 1974, it is required that no employee or public official shall make, participate in making, or in any way attempt to use his or her official position to influence a governmental decision in which he or she has a financial interest. In accordance with Section 87500 of the Government Code, certain designated employees and Council Members are required to disclose economic interests and are prohibited from participating in decisions that may have an effect on their financial interests. Furthermore, employees and officials should avoid the appearance of conflicts of interest in order to ensure that City decisions are made in an independent and impartial manner.

City employees must discharge their duties under the Employee Code of Ethics & Fraud Prevention Policy 01400.002, and the Manual in an impartial manner to foster the integrity of the City’s purchasing function and to assure fair and open competition for City business and the selection of competent, responsible vendors. All vendors shall be treated equally and fairly at all times by City personnel, with equal information given to each vendor who participates in a competitive process.

- The following actions constitute a violation of the Employee Code of Ethics & Fraud Prevention Policy: Accepting directly or indirectly, any gift, rebate, money, or anything else of value from any person or entity if the gift, rebate, money, or item

of value is intended as a reward or inducement for conducting business, placing orders with, or otherwise using the employee's position to favor the contributor;

- Aiding or assisting a bidder in securing a contract to furnish labor, materials, supplies, equipment, or services, or favoring one bidder over another;
- Giving or withholding information from any bidder; and
- Willfully misleading any bidder regarding the specifications of materials, supplies, equipment, or services.

Also, in accordance with Government Code 1090, the California Fair Political Practices Commission prohibits public officials from participating in contracts in which they have a financial interest. In addition to the above, any vendor or consultant involved in the final design, planning, or specification development of a project shall be ineligible to submit a bid or proposal for the execution or implementation of the project. This restriction is established to ensure fairness and transparency and to avoid any potential conflicts of interest.

To report a potential business conduct violation, contact the Employee Code of Ethics/Fraud Prevention Hotline 1-877-217-4728 or disclose to the appropriate supervisor or manager.

1.2 Definitions

| TERM | DEFINITION |
|---------------|--|
| Bid Splitting | Deliberate attempts to split orders, where the purpose is keeping the total cost of each order below bid limits, and failure to combine orders when practical for the best interest of the City in order to circumvent the limitations is prohibited and may result in disciplinary actions including reduced or suspended spending authority. <ul style="list-style-type: none"> ○ Bid Splitting of Public Projects: Splitting of public projects is against the law and considered a misdemeanor under Public Contract Code Section 22033. Appropriate action will be taken against those parties who intentionally split a Public Project. |
| Construction | The process of creating buildings, infrastructure, and other physical structures. |
| CUPCCAA | The City is subject to the California Uniform Public Construction Cost Accounting Act (CUPCCAA) procedures set forth in Public Contract Code Section 22000. CUPCCAA utilizes uniform procedures in the performance of, or in contracting for, public construction projects and provides an alternative bidding method for public projects. |

| | |
|-------------------------|--|
| Design | A multi-phased approach to creating a solution to a project and preparing instructions for construction. These phases include concept development, detailed design of the project, and development of construction drawings and specifications. |
| Design-Build | A construction project method delivery in which one entity works under a single contract with the City to provide design and construction services. There are specific requirements and some limitations when utilizing this method. Please reference Public Contract Code Section 22160 et seq. |
| Design-Bid-Build Method | A more traditional construction project method which involves the City entering into two main contracts. First, the City contracts the design process with one firm, then enters a second contract with a general contractor to complete the construction on the project. The design firm is ineligible to submit a bid or proposal because they have an unfair advantage after designing the project. This restriction is established to ensure fairness, transparency, and to avoid any potential conflicts of interest. |
| Encumbered | A financial commitment that reserves funds for expenses in a budget line item, before actual payments are made. As actual payments are made, the expenditure amount increases and the encumbered amount decreases. |
| Formal Bid | Used for high-value or complex procurements that exceed \$220,000 for Public Projects and Materials, Supplies and Equipment, \$125,000 for Maintenance General and Professional Services. Award of bid requires City Council approval over \$125,000. Requirements for Public Projects include public newspaper advertisement, sealed bids, detailed specifications, and award to the lowest, responsive and responsible bidder. |
| General Services | Work performed by an independent contractor that does not otherwise qualify as consulting or professional services (i.e., janitorial, security, or landscaping services). |
| Informal Bid | Used for lower-value procurements valued below \$220,000 for Public Projects and Materials, Supplies and Equipment, and below \$125,000 for Maintenance General and Professional Services. Award of bid over \$125,000 requires City Council approval. No newspaper advertising is required. |
| Installation | The process of physical assembly of a system or supporting infrastructure at its operating location. |

| | |
|------------------------------------|---|
| Maintenance Services | Activities related to keeping a product in good operating condition, servicing equipment to prevent failure and prolong the life of the asset, ensuring continuous and efficient operation of assets, and performing routine repair and replacement of existing assets. |
| Materials, Supplies, and Equipment | Articles, components, apparatus, and/or machinery required to complete a project or facilitate day-to-day operations. |
| Non-Public Project | Any type of purchase not classified as “Public Project” or “Materials, Supplies, and Equipment”. |
| Piggyback/ Cooperative Agreements | The use of an existing competitively sourced agreement from another agency to procure materials, supplies, equipment and services, at the same or lower price. This method helps streamline procurement, reduce administrative costs, and leverage competitive pricing. |
| Professional Services | Nonphysical products or services that provide assistance or management to improve specific aspects of business operations (i.e. consulting services). |
| Public Project | Construction, reconstruction, erection, alteration, renovation, improvement, demolition, installation, and repair work involving any publicly owned, leased, or operated facility. Painting or repainting of any publicly owned, leased, or operated facility. |
| Unencumbered | A purchase order that does not pre-allocate funds or have budgetary restrictions tied to it. Funds are not reserved until the actual expenditure transaction occurs. |

1.3 Contact Information

The purchasing team is available to assist when planning to purchase products or services for the City. They may be reached at (951) 736-2274 or by email at Purchasing.department@CoronaCa.Gov.

To assist in determining approval and bidding requirements based on the value of a purchase, *Reference Appendix A, City of Corona Purchasing Process Flowchart*.

2.0 AUTHORIZATION LIMITS AND REPORTING REQUIREMENTS

2.1 Authorization Limits

Authorization limits are reflected in the following table, as approved by the City Council on September 3, 2025, effective October 3, 2025.

| POSITION | PUBLIC PROJECTS | MATERIALS, SUPPLIES, AND EQUIPMENT | NON-PUBLIC PROJECTS |
|----------------------|-----------------|------------------------------------|---------------------|
| Department Directors | \$75,000 | \$75,000 | \$75,000 |
| City Manager | \$125,000 | \$125,000 | \$125,000 |
| City Council | >\$125,000 | >\$125,000 | >\$125,000 |

2.2 Delegation of Authority

The City Manager, or his designee, shall be the purchasing agent, per CMC Section 3.08.030.

Department directors, with the approval of the City Manager, may delegate their signature authority to any subordinate employee via written authorization, per CMC Section 3.08.040 (L). Per direction from the City Council on August 20, 2025 (also reference September 3, 2025 staff report), the delegation of authority is up to a maximum of 30 days. The director may provide written authorization to the Finance Director via email or memo. The written authorization needs to include the City Manager's approval.

2.3 Reporting Requirements

On a quarterly basis, a written report shall be presented to the City Council which lists purchases, contracts and agreements authorized by the City Manager, or his or her designee, between \$75,001 - \$125,000. The report shall include the dollar amount, date, approving employee title, brief description of the services or items purchased, and the vendor, contractor or other entity. This is per the Council's direction on August 20, 2025, which was incorporated into CMC Section 3.04.040 (M).

3.0 PURCHASING MECHANISMS/SUBMITTING A PURCHASING REQUEST

3.1 Submitting a Purchasing Request/Purchase Requisitions

3.1.1 Technology Purchases

All telecommunications equipment, computer equipment, and computer software shall be requested and coordinated through the Information Technology Department and should be submitted through the IT [Service Desk link](#) on the At Work webpage.

3.1.2 P-Track Submittals (Purchasing Requests)

Departments will communicate their procurement needs by entering a P-Track request. Purchasing reviews all P-Tracks to determine the completeness of the request and the appropriate procurement steps to be taken. All required fields will need to be completed, including the supplemental fillable form, budgetary information, submittal of a scope of work (if applicable), quotes, and any other documents necessary for the procurement. Reference the Purchasing Phases and Purchasing Checklists in the Appendix Section E – H. Incomplete P-Tracks will be returned to the requester to provide the outstanding items before the P-Track is considered complete and ready for processing.

For step-by-step instructions and additional training materials on the purchasing process, please reference the AtWork site, [Reference Library](#) for Purchasing.

3.1.3 Purchasing Requisitions

The purchasing team will enter a completed P-Track in OneSolution to generate a purchase requisition. Depending on the total dollar amount of the requisition, the requisition workflow may require several levels of approval. The project manager and the corresponding department director, or designee, are responsible for its accuracy and completeness and for ensuring proper funding is available.

3.2 Purchase Orders

A purchase order is a contractual agreement issued by the City to purchase goods and/or services from a vendor and a promise to pay for those goods and services. It serves as the vendor's authorization to deliver goods and services and invoice as specified and agreed. The purchase order should include, but is not limited to, quantity, description, price, terms and conditions, and delivery location. Purchasing has established terms and conditions for all purchase transactions not utilizing a City approved agreement. The [Terms & Conditions](#) can be found on the City's website. Purchasing also issues purchase orders to authorize payment and provide a method for tracking expenditures.

No work shall be performed until the receipt of a signed City of Corona Purchase Order, except as noted in the PO Exceptions Section. The Purchase Order number must be

included on all invoices. Failure to reference the correct purchase order number may result in the delay or return of the invoice.

Upon issuance of the purchase order, OneSolution will automatically distribute a copy to the vendor via email, to ensure proper delivery, receipt of goods and payment of goods and services. Purchasing will attach a copy of the PO and other supporting documentation to the P-Track. If the department determines a purchase order needs to be cancelled, a P-Track should be entered with an explanation for the cancellation.

PO EXCEPTIONS

A purchase order is not always required, and a Claim Form should be used to pay the items listed below:

- Payroll related expenses such as insurance or retirement payments as approved by City Council through the budget
- Other insurance premiums
- Travel advances or reimbursements
- Utility payments
- Membership dues
- Subscriptions
- Debt Service
- Various “pass-through” payments
- Other mandated expenditures as defined in the CMC
- Materials, supplies, and equipment purchases under \$20,000 per fiscal year. Items should follow the formal/informal procedures. This item can be processed by a claim form or a P-card.

3.3 Blanket Purchase Orders and Release Purchase Orders

Blanket purchase orders are used to purchase designated products or services on a repetitive basis from a specific vendor. Blanket purchase orders are issued for the fiscal year and automatically close at the end of the fiscal year. Most blanket purchase orders are issued unencumbered for services or products provided on an “as-needed” basis. Staff request encumbered release purchase orders, which reduce the blanket purchase order balance. This allows the allocation of funds for the purchase of products or services to appropriate account numbers.

Blanket purchase orders may be designated as encumbered or unencumbered direct pay purchase orders. Direct pay blanket purchase orders are typically used when a vendor is performing services where there will be multiple account numbers, but the amount of work, by account, is unknown until the invoice is received. Examples: Staples and Fastenal.

At the end of the fiscal year, Purchasing will contact departments regarding the closing of purchase orders. Release purchase orders encumbered against capital improvement project funding may remain open for the duration of the project. Release purchase orders using encumbered operating funds may remain open for one additional fiscal year. This

is due to system complications when issuing change orders. Change orders are drawn from the current blanket purchase order.

Vendor Used by Multiple Departments

Approval limits will apply independently for each Department Head when vendors are used by multiple departments, not cumulatively. Each separate contract/PO is subject to the same procurement guidelines and is subject to approval by the vendor and the Purchasing Agent. This is contingent upon the vendor providing the same scope of services. If a different scope of services is needed, this would be considered a new procurement request.

| Examples | Process |
|--|---|
| The Public Works department awarded a contract to vendor X in the amount of \$300,000 through a competitive bid process. Community Services wants a contract with the same vendor, X, for \$1250,000 for similar services. | Since the \$1250,000 contract value is within the informal threshold, Community Services would need to provide a memo justifying their own agreement and a separate PO with vendor X, authorized by the respective contracting party. |
| The Public Works department awarded vendor X a contract for \$300,000 through a competitive bid process. Community Services wants a contract with the same vendor, for \$350,000 for similar services. | Since the \$350,000 contract value exceeds the informal threshold, Community Services would need to have the City Council approve their own agreement and separate PO with vendor X. |

3.4 Change Orders

Change orders, or amendments to contracts, for all public and non-public projects are subject to the “next level of approval” process. This means the change order is approved based on the cumulative value and the existing approval authority, unless specified otherwise in the approved City Council Agenda Report.

As specified in the CMC, all change orders require the approval of various City personnel based on the thresholds displayed in the “Authorization Limits” Section of this document.

Change Order Approval Authorizations For Council Approved Agreements

| Procurement Type | Change Order \$ Amount and Authorization |
|---|--|
| Public Project or Materials, Supplies, and Equipment | Unless an exception is provided in CMC Section 3.08.130, the City Council must approve any contract amendment or change order that would increase the contract amount by the lesser of 10% of the original contract amount or \$125,000. For lower change order amounts, see the Authorization Limits section. |
| Non-Public Projects | Unless an exception is provided in CMC Section 3.08.130, the City Council must approve any contract amendment or change order that would increase the contract amount by the lesser of 10% of the original contract amount or \$125,000. For lower change order amounts, see the Authorization Limits section. |

Example: A purchase for the Community Services Department in the amount of \$30,000 may be approved by the Community Services Director (Non-Public Project). A change order to the purchase order in the amount of an additional \$45,000, totaling the purchase order to \$75,000, may be approved by the Community Services Director. If the change order amount was greater than \$45,000, the next level of approval would be required.

Change Order Signature Authority Exceptions:

If a department requires the ability to increase the contract award greater than the lesser of 10% of the original contract amount or \$125,000 (Public Projects or Materials, Supplies and Equipment) or \$125,000 (Non-Public Projects), City Council authorization is required. A P-Track request shall also be submitted to notify Purchasing of the change order and contract amendment request. The requesting department must include a recommended action item in the agenda report authorizing the change orders up to a specific dollar amount or percentage over the current approved amount.

Language to be included within the staff report, under the Recommended Action section, should be written as follows:

City Council authorize the City Manager, or his/her designee, to approve necessary change orders up to a cumulative value of (specify \$ amount here) of the contract amount.

Language supporting rationale for the requested change order authority amount must be included in the Analysis section of the agenda report.

Unforeseen Change orders exceeding \$125,000 for Maintenance and Construction related projects (Public Projects):

In the event of an unforeseen circumstance occurring during the course of the work that requires a change order causing the cumulative change order value to exceed the

authorized thresholds, the change order may be evaluated for immediate approval to avoid the City incurring additional costs associated with delaying the work while awaiting Council approval. Examples of these situations include, but are not limited to, the following:

- Unforeseen field conditions/circumstances, e.g., bedrock encountered during excavation, undocumented fill, conflicts with underground utilities not shown on project drawings, etc., requiring additional work beyond the original project scope.

The requesting department will consult with the Purchasing Division and assess if the situation is deemed an unforeseen event. If the situation has been determined as an unforeseen event, the requesting department and Purchasing will proceed with a Change Order that will be reported to the City Council at the following Council meeting in the form of an agenda report, initiated by the requesting department, along with all necessary supporting documentation.

The requesting department may also seek City Council authorization to reset the change order approval cumulative thresholds after the unforeseen event-change order has been incorporated into the new PO total contract amount.

Language to be included within the staff report, under the Recommended Action Section, should be written as follows:

City Council authorize the City Manager or his/her designee to approve necessary change orders up to a cumulative value of (specify \$ amount here) of the contract amount.

3.5 Purchase Orders During Activation of the Emergency Operations Center (EOC)

Emergency Purchase Orders are to be used only when computer-generated purchase orders cannot be completed due to system failure or other catastrophic events. This would typically occur when the Emergency Operations Center has been activated.

The Purchasing Agent, or his/her designee, is the only authorized signature for Emergency Purchase Orders. The Purchasing Agent can be an individual who has been granted Purchasing Agent status from the Emergency Operations Center Incident Commander. Emergency Purchase Orders must be signed prior to disbursement to a vendor.

4.0 PURCHASING TYPES AND BIDDING PROCEDURES

4.1 Materials, Supplies and Equipment

The process for purchasing materials, supplies, and equipment (including fuel) follows CMC Chapter 3.08.080. Purchases of these items are authorized by the amounts shown under the “Authorization Limits” section.

4.2 Request for Bids or Proposals

A P-track request must be submitted when soliciting for bids or proposals. Provide a clearly defined scope of work (SOW) and all additional documents needed to complete the purchasing request. Reference materials:

- *Appendix C, Scope of Work Writing Tool* for guidelines on how to develop a detailed scope of work
- *Appendix E, Notice Inviting Bids (NIB) Checklist & Phasing Matrix*
- *Appendix F, Request for Proposals (RFP) Checklist & Phasing Matrix*

Care must be exercised to avoid the use of specific products or brand names in the scope of work. When brand names are listed in a solicitation, the phrase “or equal” must be included. This item is per the Public Contract Code Section 3400, which is specific to public projects. To maintain consistency and fairness, this guideline should be applied to all types of bidding opportunities. The City uses standardized templates for bids and RFPs. The templates include substitute language that bidders must follow when proposing an alternative brand or process other than what is specified in the scope of work or specifications.

The project manager is responsible for preparing specifications or statements of work. Departments generally have the greatest understanding of functional and performance requirements; however, Purchasing will review to ensure compliance with the City’s CMC.

4.3 Alternative Procedure “Simplified Pricing Procedure”

Alternative bidding procedure is applicable to all purchases, including but not limited to public projects, professional services, maintenance and general services and materials, supplies and equipment in amounts of \$75,000 or less. As described in the CMC, the alternative procedure does not require any sort of formal or informal bidding procedure, just quotes (verbal or in writing). Project Managers shall strive to obtain verbal or written price quotes from three or more potential contractors or suppliers and accept the quote that is determined to be in the best interests of the City. If three quotes are not achievable, an explanation as to why shall be provided via P-Track. Verbal price quotes shall be documented (using the Quote Analysis Worksheet, Appendix I) and provided as backup in P-Track for a purchase requisition. The Vendor Acknowledgment Form also need to be completed by the selected vendor (Appendix J).

Helpful tips for project managers:

- It is important for the project manager to provide the appropriate model agreement and insurance requirements to all potential bidders when issuing

any alternative bid solicitation involving onsite services. This helps to ensure compliance, prevents disputes, clarifies responsibilities, and encourages fair competition, with all vendors receiving the same information. Check with Purchasing for all requirements regarding services performed on City property, also referred to as “on-site services” (Bonds, DIR Registration, etc.). If the department intends to have pricing from the alternative bidding procedure valid for multiple years, that requirement must be stated in the solicitation.

- When obtaining quotes, clearly identify any prevailing wage or bond requirements needed to the potential vendor to ensure they have considered those costs when providing a quote.

Alternative/Informal Bidding Thresholds are subject to the following dollar amounts:

| Purchase \$ Amount | Bidding Process Required |
|--|--|
| \$0-\$20,000 (all types) | Competitive bidding to be used at the discretion of the department. |
| \$20,001-\$75,000 (all types) | A minimum of three vendors shall be solicited for quotes or proposals; Contact the Purchasing Division to complete the bidding process. |
| \$75,001-\$125,000 (Non-Public Projects) \$75,001-\$220,000 (Public Projects or Materials, Supplies, and Equipment) | Informal bidding procedures should be followed. |

4.4 Proprietary Projects or Sole Source Products

Proprietary projects or sole source product bidding procedures are governed by CMC Sections 3.08.100 (E), 3.08.110 (D) and 3.08.120 (D). These purchases are an exception to normal procurement procedures and require a detailed justification. The detailed justification should indicate that the Director of the department certifies that, to the best of their knowledge, the project product or service is proprietary in nature and can be obtained only from one vendor or contractor and that no equivalent products or services are available. For approval limits please reference the Authorization Limits Section.

Departments are advised not to commence any work until final approval is obtained from the Purchasing Manager and, if necessary, the City Manager and/or City Council.

4.5 Competitive Bidding Already Completed (Piggyback/ Cooperatives)

The City may employ the competitive bidding method, commonly known as “piggybacking”, to acquire materials, supplies, equipment, and services through bids conducted by another public agency. This approach is permissible when the price offered

to the City is equal to or more favorable than that provided to the originating agency. These transactions are governed by CMC Section 3.08.125.

The bidding documents and selection processes utilized by the other government entity must align with the City's purchasing regulations and allow other public agencies to participate in the bid.

All purchases must be reviewed and approved by the City's Purchasing Manager or their designated representative.

4.6 Public Projects

4.6.1 Bidding Thresholds for Public Projects

Informal/Formal Bidding Thresholds are subject to the following dollar amounts:

| Purchase \$ Amount / Type | Bidding Process Required |
|--|---|
| \$0-\$20,000 (all types) | Competitive bidding to be used at the discretion of the department. |
| \$20,001-\$75,000 (all types) | A minimum of three vendors shall be solicited for quotes or proposals; Submit the quotes with the P-Track request. |
| \$75,001-\$125,000 (Non-Public Projects) \$75,001-\$220,000 (Public Projects or Materials, Supplies, and Equipment) | Informal bidding procedures should be followed; Contact the Purchasing Division for assistance and to complete the bidding process. |
| Over \$125,000 (Non-Public Projects) Over \$220,000 (Public Projects or Materials, Supplies, and Equipment) | Formal bidding procedures should be followed (require City Council approval over \$125,000). Contact the Purchasing Division to complete the bidding process. |

4.6.2 Exceptions to Competitive Bidding for Public Projects

These purchases are an exception to normal procurement procedures, as authorized in CMC 3.08.050(A). Departments may follow the alternative procedures for purchases up to \$75,000 and provide a Memo specifying one of the justifications listed below as authorized by Public Contract Code Section 22032(a).

Exceptions for Public Projects are as follows:

| Purchase \$ Amount | Approval Authorization Required |
|---------------------------|--|
| \$1-\$75,000 | <ul style="list-style-type: none"> ➤ By Force Account (Employees of the City) ➤ By Negotiated Contract (Single Quote) |
| \$75,001-\$125,000 | <ul style="list-style-type: none"> ➤ No competitive Market (Requires City Council determination approval) ➤ No Bids Received ➤ Otherwise Authorized |
| Over \$125,000 | Requires City Council approval |
| Emergencies | |
| \$75,001-\$500,000 | ➤ Emergencies (Report project to City Council) |

4.6.3 Public Projects – Formal Bidding – Notice Inviting Bids (NIB)

Per Section 3.08.090 (C), a notice inviting formal bids shall be provided. Notices inviting formal public project bids shall be posted in a newspaper at least 14 calendar days before the bid opening date and posted in the trade journals at least 15 calendar days before bid opening date. The minimum information to be included in the notice inviting formal bids shall be:

1. Describe the project;
2. State how to obtain more detailed information about the project;
3. State the date, time, and place for the submission of sealed bids; and
4. Include any other information required by state or local law, as determined by the City Attorney.

4.6.4 Public Projects – Informal Bidding

Per Section 3.08.100 (D), a notice inviting informal bids shall be provided. The minimum information to be included in the notice inviting informal bids shall be:

1. Describe the project in general terms;
2. State how to obtain more detailed information about the project;
3. State the date, time, and place for the submission of sealed bids; and
4. Include any other information required by state or local law, as determined by the City Attorney.

4.7 Non-Public Projects

4.7.1 Bidding Thresholds for Non-Public Projects

Informal/Formal Bidding Thresholds are subject to the following dollar amounts:

| Purchase \$ Amount / Type | Bidding Process Required |
|--|---|
| \$0-\$20,000 (all types) | Competitive bidding to be used at the discretion of the department. |
| \$20,001-\$75,000 (all types) | A minimum of three vendors shall be solicited for quotes or proposals; Submit the quotes with the P-Track request. |
| \$75,001-\$125,000 (Non-Public Projects) \$75,001-\$220,000 (Public Projects or Materials, Supplies, and Equipment) | Informal bidding procedures should be followed; Contact the Purchasing Division for assistance and to complete the bidding process. |
| Over \$125,000 (Non-Public Projects) Over \$220,000 (Public Projects or Materials, Supplies, and Equipment) | Formal bidding procedures should be followed (require City Council approval over \$125,000). Contact the Purchasing Division to complete the bidding process. |

4.7.2 Exceptions to Competitive Bidding for Non-Public Projects

These purchases are an exception to normal procurement procedures and require a detailed justification and citing the appropriate section from CMC Section 3.08.140 Exceptions to competitive bidding - non-public projects. Departments should not commence any work until the Exception to Bid Memorandum receives final approval from the Purchasing Manager and, if necessary, the City Manager and/or City Council.

Exceptions for Non-Public Projects are as follows:

| Purchase \$ Amount | Approval Authorization Required |
|---------------------------|--|
| \$20,001 - \$75,000 | Departments to provide an Exception to Bid Memo (ETB) specifying the justification. |
| \$75,001 - \$125,000 | Departments to provide an ETB memo specifying the justification, signed by the City Manager. |
| Over \$125,000 | Requires City Council approval |

4.7.3 Non-Public Projects – Formal Bidding

Per Section 3.08.110 (B), the— notices inviting formal bids or request for proposals shall be posted as described in the Manual. Items shall be posted at least ten (10) calendar days prior to the bid or proposal opening.

Per Section 3.08.110 (C), a notice inviting formal bids or request for proposals shall be provided. The minimum information to be included in the RFP or bid notice shall be:

1. Describe the project or purchase in general terms;
2. State how to obtain more detailed information about the project or purchase;
3. State the date, time, and place for the submission of bids or proposals; and
4. Include any other information required by state or local law, as determined by the City Attorney.

4.7.4 Non-Public Projects – Informal Bidding

Per Section 3.08.120 (B), the notice inviting bids or requests for proposals shall be provided as described in the Manual. Generally, staff will send the notice to at least three (3) vendors or contractors. Also, reference Bidding Thresholds above for variations based on the value of the project or service.

Per Section 3.08.120 (C), a notice inviting informal bids or request for proposals shall be provided. The minimum information to be included in the RFP or bid notice shall be:

1. Describe the project or purchase in general terms;
2. State how to obtain more detailed information about the project or purchase;
3. State the date, time, and place for the submission of bids or proposals; and
4. Include any other information required by state or local law, as determined by the City Attorney.

4.8 Filing of Bid Protests

If a City of Corona bid document does not include specific protest procedures, the following procedures will apply.

Bidders may file a “protest” of a bid with the City’s Purchasing Manager. In order for a bidder’s protest to be considered valid, the protest must:

- A. Be filed in writing within five (5) calendar days after the bid opening date.
- B. Clearly identify the specific irregularity or accusation.
- C. Clearly identify the specific City staff determination or recommendation being protested.
- D. Specify, in detail, the grounds of the protest and the facts supporting the protest.

E. Include all relevant, supporting documentation with the protest at time of filing.

If the protest does not comply with each of these requirements, it will be rejected as invalid.

If the protest is valid, the City's Purchasing Manager, or other designated City staff member, shall review the basis of the protest and all relevant information. The Purchasing Manager will provide a written decision to the protestor within fourteen (14) calendar days. The protestor may then appeal the decision of the Purchasing Manager to the Finance Director within five (5) calendar days of the date of the written decision from the Purchasing Manager. The Finance Director will provide a written decision to the protestor's appeal. The decision from the Finance Director is final and no further appeals will be considered.

4.9 Expedited Purchasing Requests NIB/RFP

If a purchasing request needs to be expedited, please submit the Expedited Purchasing Request form (*Appendix D, Expedited Purchasing Request Form*). Once the form has been approved, please email the completed form to Purchasing.department@CoronaCa.Gov. It is recommended that you also notify the Purchasing Division as soon as possible that an expedited request is in process, so workloads may be adjusted if needed.

5.0 CONTRACTS AND AGREEMENTS

Following a successful procurement process, the project/contract manager will engage in contract negotiations with the selected vendor. Through this process, the project/contract manager will endeavor to use the City's standard contract and agreement templates (*Appendix B, City of Corona Purchasing Model Agreements List*). The City's standard agreement offers an initial term of 4 years from the execution date and two additional, optional one year extensions. Any deviation from these requirements must be coordinated with the Purchasing Manager and final approval authority rests with the City Attorney/Legal & Risk Management Director.

In some cases, vendors will request edits to these. Substantive edits require review from the City Attorney's Office. In this case, the project/contract manager should work with the City Attorney's Office to address the requested edits.

The project/contract manager is responsible for assisting the selected vendors in procuring a business license (if required), certificates of insurance and endorsements, and necessary bond documents (if required). Once all documents are obtained, they should be submitted to the purchasing staff via P-Track.

Failure to secure executed agreements, proper insurance and endorsements, and bond documents for services performed on City property renders the City unprotected against any subsequent claims by vendors. Insurance requirements may vary depending on the type of service provided. See the insurance section of the specific agreement to be used for general insurance requirements. Additional references include the Insurance Requirements Section in the Manual and the Insurance Matrix in Appendix M.

On-site Services

Services involving the performance of work on City property (also known as on-site services) shall not be procured unless there is a fully City approved executed agreement for the work and the vendor has current insurance certificates and endorsements. Vendors providing on-site services are required to execute one of the City's model agreements. In situations where that is not feasible, the requesting department is responsible for requesting the City Attorney/Legal & Risk Management Director review and approval before executing any nonstandard agreement.

6.0 BONDS AND INSURANCE

6.1 Bonds

Surety Bonds are established to protect the City's best interests. All Surety Bond requirements must be stated in all applicable bidding documents. The City, at its discretion, may waive the requirements for Surety Bonds subject to compliance with state and federal laws.

Payment Bonds – These are surety bonds posted by a contractor to guarantee that its subcontractors and materials suppliers on the project will be paid.

The City of Corona is required to obtain a payment bond for public projects as defined by California (CA) Civil Code (CIV) 9550 for contracts exceeding \$25,000. If a department is utilizing the Alternative Bidding “Simplified Pricing Procedure” they are required to consult with the Purchasing team for bond requirements pursuant to California (CA) Civil Code (CIV) 9550.

Bid Bonds – These bonds ensure that the bidder on a contract will enter into the contract and furnish the required payment and performance bonds if awarded the contract. They are required by Public Contract Code for formal public works bidding and may also be required during other bidding processes.

Performance Bonds – These bonds guarantee the completion of the project according to the contract terms. They are typically required for construction projects to ensure that the contractor performs the work as specified.

6.2 Insurance Requirements

The following insurance requirements should apply to most City-approved contracts and agreements for work performed on City property. Generally, the City of Corona will require contractors to provide evidence of current General Liability insurance with an endorsement to name the City of Corona as an additional insured; Auto insurance of a specified dollar amount per occurrence; Workers' Compensation coverage with statutory limits; Employer's Liability of a specified dollar amount per occurrence; and a Workers' Compensation Waiver of Subrogation endorsement. Project managers with projects that contain unusual hazards or risks should consult with the City's Legal / Risk Management Director prior to a bid solicitation.

Agreement templates available on the City's AtWork site include details of insurance requirements. Model Agreements and Instructions can be viewed on the AtWorks site under Forms and Templates, Purchasing folder. Any requested changes to the insurance requirements shall be discussed with the Purchasing team, ideally before going out to Bid or RFP. Proof of insurance shall be required to be provided by the vendor prior to approval of the agreement, unless waived by the City Manager or his/her designee. Project managers will be responsible for ensuring that the vendor's insurance documents are current and compliant with the agreement/contract for the duration of the

agreement/contract, including obtaining new and updated and renewal insurance documents.

7.0 CREDIT CARD PURCHASES – Use of P-Cards

The purpose of the City's credit card program (P-Card) is to establish a more efficient and cost-effective method of purchasing City supplies and equipment. The program will help expedite purchases as well as reduce the number of purchase orders, invoices, and checks..

Essentially, the cardholder is delegated the authority to purchase certain materials, supplies, and equipment within specified dollar amounts for business-related purposes for the City. [Administrative Policy 01200.003](#), City Issued Credit Cards, outlines the administrative procedures and requirements for the application, use, and reporting of P-Card transactions, and shall be strictly followed by all cardholders. The Manual provides guidance on procurement criteria and transaction types.

Note: All telecommunications equipment, computer equipment, and computer software shall be requested and coordinated through the Information Technology Department and should be submitted through the IT Service Desk link on the AtWork webpage.

A. Allowable Transaction Types

The following types of purchases can be made with the P-Card:

- Membership dues and subscriptions
 - Registration for conferences and training
 - Reservation for approved travel/lodging
 - Supplies, materials, and small equipment (subject to per transaction limit)
 - Software licensing and renewals
- On-site¹ services that are less than \$20,000 annually may use the appropriate agreement, provided the department secures the proper Certificate of Insurance. Both documents (agreement and insurance) are required as backup for the credit card payment.

B. Prohibited Purchases

Any services, including on-site services, that do not qualify under the Allowable Transaction Types, shall not be acquired on a credit card due to the lack of insurance and language indemnification associated with these purchases (violators are required to submit a justification memo signed by the department head and may be subject to having their credit card rights revoked).

C. Travel, Meal and Other Expenses

For expenditures relating to travel, meal and others, follow the [Travel and Other Expense Reimbursement Policy 01200.001](#).

¹ An on-site service includes, but it is not limited to a variety of professional and maintenance and general services provided directly at the City's location rather than remotely or at the service provider's premises.
Rev. September 2025

8.0 SPECIAL FUNDING REQUIREMENTS

8.1 State, Federal and Grant Funding

Any purchases made with state, federal, or grant funds shall comply with all laws, rules, and regulations made applicable by the funding source (CMC Section 3.08.040 (K)). The requesting project manager is responsible for understanding all requirements and provisions of the grant. If needed, the project manager can work with the City's Grant Analyst for assistance.

When submitting a P-Track for a bid or proposal that is funded by a state, federal, or other grant, it must be documented as such, along with any deadlines set by the grant. Purchasing staff will work with the project manager to ensure the request is posted according to all the requirements of the grant, as provided by the project manager. Purchasing is not responsible for researching and understanding all the details and complexities of the grant. They are solely responsible for understanding the purchasing requirements of the grant.

For all federal procurements, a minimum of (3) written price quotations must be obtained and documented by completing the Informal Federal Procurement Bid Sheet for HUD/CDBG Funded Projects. Awarding an informally bid project without (3) three price or rate quotations documented in the file is a risky proposition that can result in the disallowance of costs (i.e. loss of federal dollars to the City). A "No Bid" or no response is not sufficient.

8.2 Federal Transit Administration Assisted Procurements

The Federal Government, through the Federal Transit Administration (FTA), provides financial assistance to develop new public transportation systems and improve, maintain, and operate existing systems. Each FTA grantee is responsible for managing its program and projects in compliance with applicable Federal requirements, and the FTA is responsible for ensuring that grantees, including the City, comply with those requirements. Grantees use their own procurement procedures that reflect applicable state and local laws and regulations, provided that the process ensures competitive procurement and the procedures conform to applicable federal law, including Title 49—Transportation, Code of Federal Regulations (CFR), Part 18-Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (specifically Section 18.36-Procurements) and FTA Circular 4220.1F, "Third Party Contracting Guidance."

To assist in meeting the standards of FTA Circular 4220.1F, City staff may consult FTA's Best Practices Procurement Manual (FTA Manual). The FTA Manual consists of suggested procedures, methods, and examples which FTA encourages. These suggestions are based on the Federal acquisition process, Comptroller General Decisions, and "Best Practices" of grantees and others in the industry. The FTA Manual is envisioned as an ongoing and expanding document. It will be updated periodically with new subjects as well as additions or changes to existing subjects. The FTA Manual can

be found at <https://www.transit.dot.gov/funding/procurement/third-party-procurement/best-practices-procurement-manual>.

9.0 LOCAL BIDDER PREFERENCE PROGRAM

In an effort to foster economic sustainability and strengthen local economic activity, the City Council has made certain findings and approved a Local Bidder Preference Program (Program). The parameters of the program can be found in CMC Section 3.08.060 (K) and Section 3.08.080 (K).) To be eligible to qualify for this Program, a Local Business (as defined in the CMC) must demonstrate that it (i) has fixed facilities with employees located at a business address within City limits (a post office box or residence is insufficient); and (ii) has an appropriate City business license/permit. A Local Business seeking to qualify for this Program shall provide supporting information and certify in writing that it meets the above requirements as part of its bid. The Program allows for a 5% Local Business preference on competitive bids received for maintenance work and other general services projects and purchases of materials, supplies, and equipment up to a maximum contract/purchase amount of \$220,000. For recurring purchases, the Local Program shall be applicable only to the City's first \$220,000 worth of such purchases for any fiscal year, as determined by city staff in its sole discretion. For such recurring purchases, the bidding documents shall indicate whether or not the Local Program is in effect for the applicable procurement. If the Local Program is applicable to a bid offering, it shall be noted in the applicable bid solicitation. The Program shall be applicable to all such purchases or contracts that are competitively bid, unless otherwise required by law (i.e., special state or federal grant programs).

If this Program is applicable to a bid offering, it shall be noted in the bid solicitation. In applying the Program to bids on a City contract or purchase subject to the Program, a qualifying Local Business shall be entitled to a reduction of 5%, in the tabulation of its bid for purposes of determining the lowest responsible bidder.

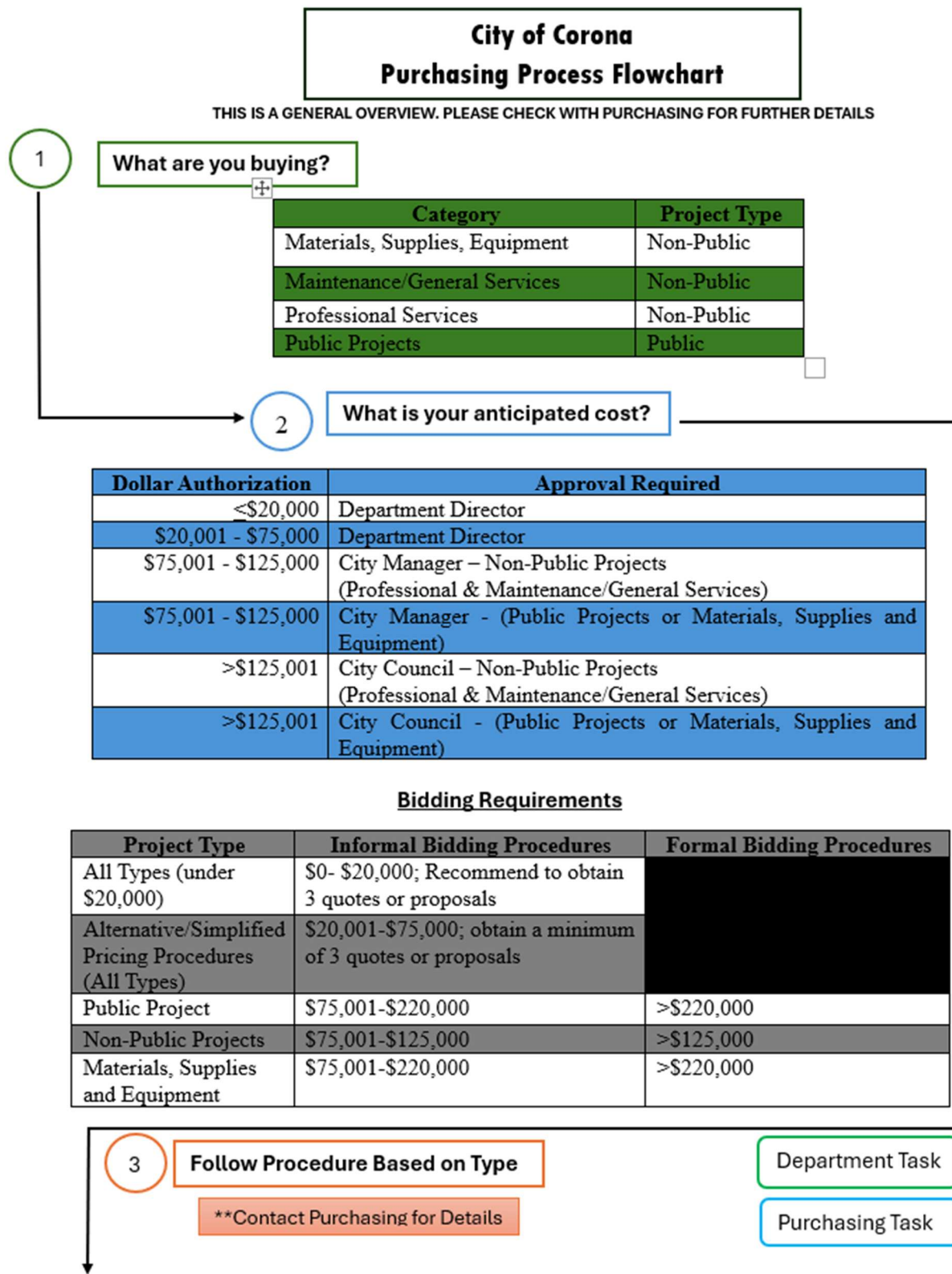
The Local Program may also establish a preference for purchases of materials, supplies, and equipment, as well as contracts for maintenance work and other general services, which are competitively bid and which involve an expenditure of more than \$220,000. Such preference shall allow the City to take into consideration the net sales tax to be returned to the City as a result of an award to a qualifying Local Business in determining the lowest responsive and responsible bidder. The net sales tax shall be calculated based on the applicable bid price provided by the bidder in accordance with the City's purchasing policy.

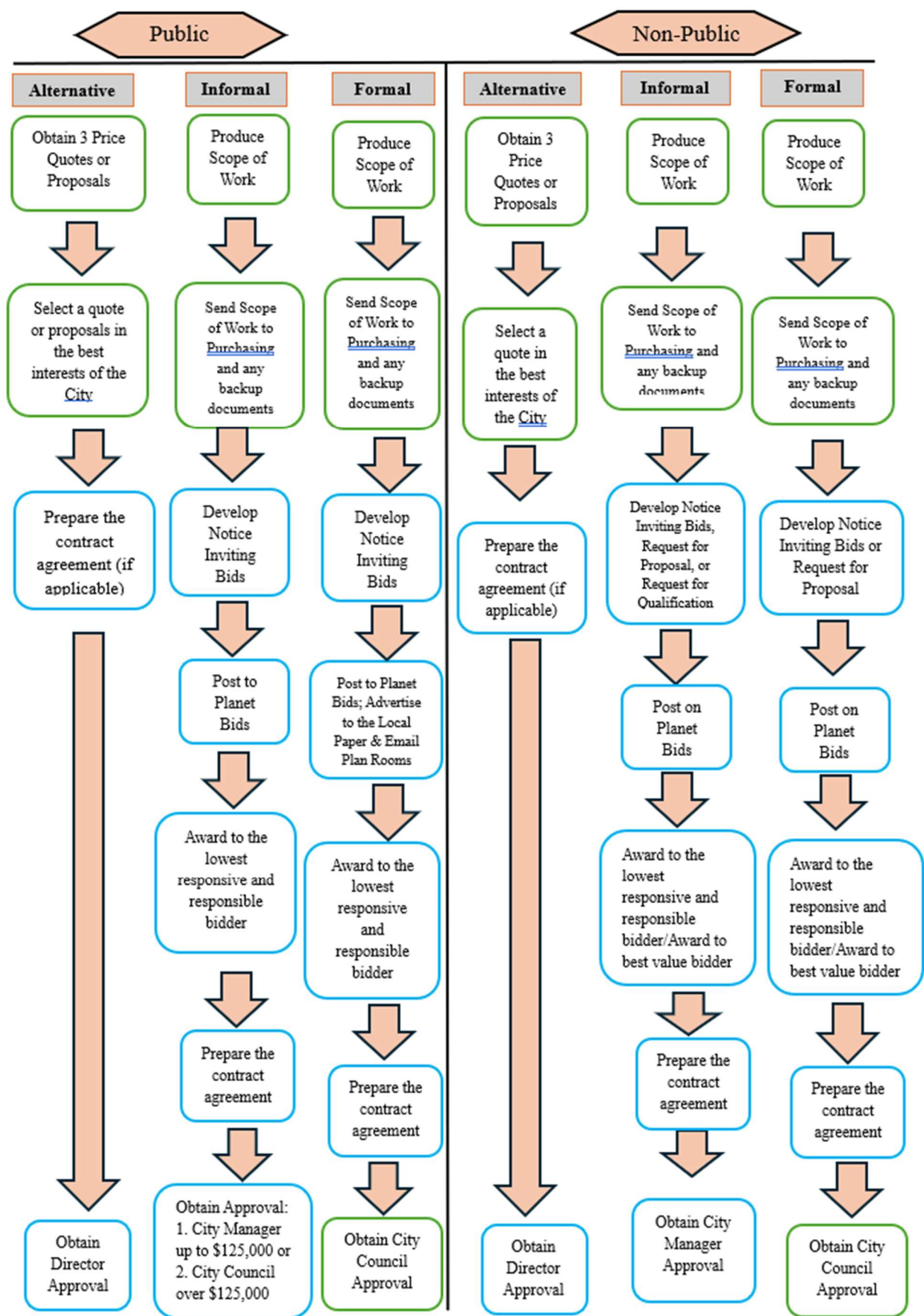
This Program does not apply to public project bids or requests for professional services proposals; however, City departments should make every effort to invite local vendors to participate by way of direct solicitation and coordination with local business organizations. Departments are encouraged to select a local firm for professional service contracts as long as all specifications are met, and pricing is competitive.

10.0 DONATION OF SURPLUS

Per the CMC Section 3.08.150, the City Manager and Finance Director will consider the donation of surplus materials, supplies or equipment that have no commercial value or would require an expenditure of funds for continued care, handling, maintenance or storage which would exceed the estimated value. Staff may also refer to [Donation of Surplus Property Policy 01300.004](#), posted on the AtWork site.

APPENDIX A: PURCHASING PROCESS FLOWCHART





APPENDIX B: PURCHASING MODEL AGREEMENTS LIST

City of Corona Purchasing Model Agreements List Reference Guide

| Agreement Type | Purpose |
|--|---|
| Maintenance/General Services Agreement (MGSA) | Routine maintenance/repair work of a non-professional nature, such as: <ul style="list-style-type: none"> • Landscape • Traffic Signal • Electrical • Street Sweeping • HVAC • Plumbing • Vehicle maintenance/services |
| Amendment to Maintenance/General Services Agreement | Use when amending terms and conditions of an existing maintenance services agreement. This should always be used to amend City Council-approved agreements. |
| Performance or Presentation Agreement | Use for an independent contractor providing services such as: <ul style="list-style-type: none"> • Instructional Training (Team Building, CPR, etc.) • Conference/Seminar |
| Professional Services Agreement (PSA) | Professional consultant (independent contractor) work, such as: <ul style="list-style-type: none"> • Computer/Data Processing • Environmental Review • Financial Services • Licensed Landscape Architect • Registered Professional Engineer • Licensed Professional Land Surveyor • Legal Services |
| Amendment to Professional Services Agreement | Use when amending terms and conditions of an existing professional services agreement. This should always be used to amend City Council-approved agreements. |
| Short Form Letter Agreement | Small projects (not included in definition of “public project” under Public Contract Code 20161 or 22002), such as professional, maintenance and repair jobs involving little money, complexity and risk. |
| Short Form Construction Contract (SFCC) | Small or uncomplicated public works projects which do not require formal bidding. |

APPENDIX C: SCOPE OF WORK WRITING TOOL

There are no firm rules for the format or length of the Scope of Work (SOW). The best guideline is that the SOW should contain enough information to encourage bids or proposals that include the level of quality products/services requested, at a price that is acceptable and beneficial to the City. The following is a suggested outline for the SOW, as well as the information that may be included in each section. The bold items can be used as the header for each section.

Care must be exercised to avoid the use of specific products or brand names in the SOW. When brand names are listed in a solicitation, the phrase "or equal" must be included. This item is per Public Contract Code Section 3400, which is specific to public projects. To maintain consistency and fairness, this guideline should be applied to all types of bidding opportunities.

1. **Introduction and General Information.** Purpose or objective of the solicitation/project, history and background of the project, required contractor qualifications, calendar of events for the solicitation and award of contract.
2. **Task Description.** The work to be done by the contractor will be used in subsequent negotiations to develop the final scope of work included in the agreement.
3. **Constraints on the Contractor.** Worksite conditions, ordinances, and security control. Include any known information that may be required by the contractor in submitting a suitable proposal.
4. **Contractor Personnel Requirements.** Qualifications of key personnel, employee identification, and additional personnel responsibilities. Resumes of key personnel may be requested.
5. **Contractor Responsibilities.** Quality control program, service complaints, emergency assistance, and work schedule.
6. **City Responsibilities.** What will the City do or provide to the contractor? The list may include such things as providing geotechnical reports, previous studies and existing plans or drawings or a description of the work to be performed in conjunction with the work performed by the contractor such as plan checks or installation of data ports.
7. **Evaluation of Contractor Performance.** Performance standards, evaluation forms, incentives, and liquidated damages.
8. **Reporting Requirements and Procedures.** Contractor's reporting schedule and responsibilities. Items included here may relate to task completion dates, timelines, and milestones.
9. **Special Conditions.** Payment procedures, insurance, bonds, alternative surety, and contract extension/renewal.
10. **Evaluation Criteria.** Evaluation of responses and the ranking of consultants. Weight of evaluation criteria.
11. **Exhibits.** Technical reports, maps, drawings, schedules, and photographs.

10 Key Areas to Write a Good SOW

(Credit to Jack Pellegrino, CPCM, Director of Purchasing & Contracting, County of San Diego 2016)

Departments should use this outline to develop clear and concise statements of work to fully describe the work to be performed, deliverables, and outcome expectations of any contracting effort. This outline is a guideline and should be adapted as necessary by each department to properly and fully define its program needs. As the SOW is developed, the department should consider the questions: What; When; and by Whom; to fully describe how the department will review/monitor the contractors' performance of the established SOW requirements after the contract award (typically documented in a Contract Monitoring Plan). Asking these questions about the post-award review and monitoring often leads to more clarity of the departments' needs and expectations of what should be included in the SOW.

Topic Areas/Sections

1. **Description** of the effort: What are we buying and what is the context of the procurement
2. **Roles and Responsibilities**: Identify the parties involved in the contracting effort and their responsibilities
3. **Performance Expectations and Deliverables**: Performance characteristics and what is required
4. **Period of Performance and Deliverable dates**: Calendar dates; weeks or months after award
5. **Inspection & Acceptance**: How will the department determine that the services/effort was successfully completed
6. **Warranty of services/product**: What is covered; for what duration; and what are the remedies for correction
7. **Personnel and/or Staffing Requirements**: Key named staff; qualifications; background checks required, etc.
8. **Special Terms and Conditions of work requirement**: Equipment; locations; licenses; clearances
9. **Meetings** (if required): Who; When; Where; and What should be covered
10. **Other Notices required by Contractor**: Events and areas that the contractor needs to provide timely notice to the County and/or third parties

APPENDIX D: EXPEDITED PURCHASING REQUEST FORM

CITY OF CORONA
EXPEDITED PURCHASING REQUEST

Date: _____ Department: _____

P-Track # _____

NOTE: All supporting documents should be attached to the noted P-Track number.

| Amount | Vendor Name (if known) | Project Name (if applicable) |
|--------|------------------------|------------------------------|
| | | |

How much sooner does this P-Track request need to be completed than the standard time frame provided in the Purchasing Manual?

Justification to rush the purchasing request: _____

Department Head Approval: _____ Date: _____

Assistant City Manager Approval: _____ Date: _____

New 11/01/2023

APPENDIX E: PURCHASING NOTICE INVITING BIDS (NIB) CHECKLIST & PHASES MATRIX



PURCHASING NIB CHECKLIST

CONTACT INFORMATION

- ☐ Requestor Name
- ☐ Phone Extension Number
- ☐ Date
- ☐ Requestors Title
- ☐ Department/Division
- ☐ Date of Request

PROJECT INFORMATION

- ☐ Request Type, Select one
 - Please select from list –
 - Agreement/Contract Amendment
 - Bid/RFP
 - Blanket Purchase Order
 - Change Order (CO)
 - Insurance
 - New Agreement/Contract
 - Project P Purchase Order
 - Purchasing Advice
 - Release Purchase Order (RPO)
- ☐ Category, Select one
 - Please select from list –
 - Professional Services
 - Maintenance and General Services
 - Materials, Supplies and Equipment
 - Construction
 - Other
- ☐ Requesting Manager
- ☐ Project Name
- ☐ Description of the Project

TIMELINES

- ☐ Date Needed
- ☐ Fiscal Year

BUDGET

- ☐ Encumber PO – Y/N

- ☐ Estimated Value – Approved by the Project Manager/Engineer
- ☐ Account Information – GL/JL Key
- ☐ Budgeted Amount

ATTACHMENTS

- ☐ Scope of Work/Services including but not limited to:
 - ☐ Introduction and General Project Information
 - ☐ Detailed Task Description work to be done by the consultant/contractor
 - ☐ Constraints on the consultant/contractor, Ordinances and security control, worksite conditions
 - ☐ Consultant/contractor personnel requirements and qualifications
 - ☐ Consultant/contractor responsibilities, Quality control, service complaints, work schedule
 - ☐ Special funding requirements, Grant requirements
 - ☐ Evaluation of consultant/contractor performance, performance standards
 - ☐ Reporting requirements and procedures, Task completion dates, timelines, milestones
 - ☐ Special conditions, Term of Contract, Payment procedures, insurance, bonds, contract extensions, renewal
 - ☐ Exhibits, Technical Reports, maps, drawings, schedules, photographs

- ☐ Exhibits, Technical Reports, maps, drawings, schedules, photographs
- ☐ For Public Projects drawings need to be signed by Public Works (Director/City Engineer and CIP Manager/Assistant City Engineer)
- ☐ Bid Schedule
- ☐ Quotes
- ☐ Other supporting documents
- ☐ Form W9 if applicable for new vendors

NOTES AND COMMENTS

- ☐ Provide internal information for the buyer
- ☐ Approval workflow code (Sec Code)

FUNDING CHECK

- ☐ Are the funds available?
- ☐ Provide grant funding source and requirements

PURCHASING PHASES MATRIX (NIB)

| TASK | RESPONSIBILITY: | |
|--|------------------|-----------------|
| | PURCHASING STAFF | PROJECT MANAGER |
| P-Track submitted including all supporting documents per checklist | | X |
| Determine Bid project manager (SME) | | X |
| PHASE 1 – Draft Bid – 10+ DAYS | | |
| Review P-Track for completeness and review scope provided to confirm the proper procurement approach | X | |
| Assign or reject P-Track based on completeness of requirements | X | |
| Work with requesting department on any clarifications | X | X |
| Use appropriate template to draft bid document and create timeline | X | |
| PHASE 2 – Bid Posted – 45+ DAYS | | |
| Finalize Bid document and send to department for review | X | |
| Department review and approval | | X |
| Prepare Bid document for posting on PB and legal advertising notice as applicable | X | |
| Post NIB on Planet Bids and provide to newspaper when applicable (Standard period of time is 30 days) | X | |
| Send invitations to plan rooms, trade journal | X | |
| Track and manage the Bid | X | |
| Job Walk (if necessary) | X | X |
| Manage vendor questions and Request for Information (RFI) | X | |
| Provide responses to vendor questions | | X |
| Prepare/post addenda | X | |
| PHASE 3 – Bid Close – 14+ DAYS | | |
| Download and review all Bid proposals | X | |
| Investigate Protests | X | X |
| Verify vendor information and determine if vendor proposals are responsive/responsible | X | X |
| Work on any exceptions proposed to City's terms and conditions (Legal approve "as to form") | X | X |
| PHASE 4 – Bid Evaluation – 21+ DAYS | | |
| Prepare the evaluation score sheet/bid summary, Bid proposals, and cost file as applicable. Exceptions for grant funded items. | X | |
| Ask for clarification on submitted Bids from vendor (if needed) | | X |

| | | |
|--|---|---|
| Provide guidance and clarification to department on submitted Bids | X | |
| Negotiations – pricing or scope of work | | X |
| Negotiations – Contract/Exceptions - any exceptions proposed to City's terms and conditions (Legal approve "as to form") | X | |
| Clarifications, protests, interviews, references | X | X |
| PHASE 5 – Bid Awarding – 14+ DAYS | | |
| Review and file all score sheets and cost file | X | |
| Vendor/Consultant selection | | X |
| Vendor registration | X | |
| Notify vendors and post results on PB (upon PO issuance) | X | |
| Prepare Notice of Intent to Award Letter (NOI) requiring the Vendor to provide Insurance within 14 days of receipt (Verification of Insurance) | X | |
| PHASE 6 – Contract Approval/Council Approval – 30+ DAYS | | |
| Develop contract | X | |
| Contract review/approval | | X |
| Route contract for signatures | X | |
| Contract compliance and audit functions (insurance) | X | X |
| Prepare Staff Report for City Council (if necessary) | | X |
| Review Staff Report in Agenda Mgt. System (if necessary) | X | |
| Council Approval/Presentation (if necessary) | | X |
| Notice of Award | X | X |
| PHASE 7 – PO Issuance - 14+ DAYS | | |
| Verification of all City requirements for PO (insurance, BL, SAM etc.) | X | |
| Creation of PO | X | |
| Review/Approve PO | | X |
| Notice to Proceed | | X |
| Post results on PB (update status to "Award") | X | |

The timeline provided above should be completed within 5-7 months from the Draft Bid phase to the PO issuance phase. The specific number of days will be adjusted accordingly based on the department's needs and the complexity of the purchasing process. These timelines are approximate, and it's important to remain flexible to accommodate unforeseen circumstances that may arise during the purchasing process.

APPENDIX F: PURCHASING REQUEST FOR PROPOSAL (RFP) CHECKLIST & PHASES MATRIX



REQUEST FOR PROPOSAL (RFP) CHECKLIST

CONTACT INFORMATION

- ☐ Requestor Name and Title
- ☐ Department/Division
- ☐ Phone Extension Number
- ☐ Requesting Manager
- ☐ Date of Request

PROJECT INFORMATION

- ☐ Request Category
 - ☐ Professional Services
 - ☐ Maintenance and General Services
 - ☐ Materials, Supplies, and Equipment
 - ☐ Construction
 - ☐ Other
- ☐ Project Name
- ☐ Project Description

TIMELINES

- ☐ Date and fiscal year needed
- ☐ If applicable, share any other important dates

BUDGET

- ☐ Encumber PO – Y/N
- ☐ Estimated Value – Approved by the Project Manager/Engineer
- ☐ Account Information – GL/JL Key
- ☐ Budgeted Amount

ATTACHMENTS

- ☐ Quote(s)
- ☐ Scope of Work/Service(s)
 - ☐ Introduction and General Project Information
 - ☐ Detailed Task Description work to be done by the consultant/contractor.
 - ☐ Constraints on the consultant/contractor, Ordinances and security control, worksite conditions
 - ☐ Consultant/contractor personnel requirements and qualifications
 - ☐ Consultant/contractor responsibilities, Quality control, service complaints, work schedule
 - ☐ Special funding requirements, Grant requirements
 - ☐ Evaluation of consultant/contractor performance, performance standards
 - ☐ Reporting requirements and procedures, Task completion dates, timelines, milestones
 - ☐ Special conditions, Term of Contract, Payment procedures, insurance, bonds, contract extensions, renewal
 - ☐ Evaluation Criteria, Provide evaluation team names, points of contact for project
 - ☐ Pre-proposal meeting requirements if applicable. Contact information and location.

- ☐ Exhibits, Technical reports, maps, drawings, schedules, photographs
- ☐ Bid schedule (Itemized list of bid items)
- ☐ If applicable
 - ☐ ETB, Staff Report,
 - ☐ W9 (Request for Taxpayer Identification) for New Vendors
- ☐ Other supporting documents
 - ☐ Provide internal information for the specialist/buyer
 - ☐ Approval workflow code (Sec Code)
 - ☐ Reference RFP or NIB
 - ☐ Funding Check – funding source/requirements

PURCHASING PHASES MATRIX (RFP)

| TASK | RESPONSIBILITY: | |
|--|------------------|-----------------|
| | PURCHASING STAFF | PROJECT MANAGER |
| P-Track submitted including all supporting documents per checklist | | X |
| Determine proposal evaluation team | | X |
| PHASE 1 – Draft Proposal – 10+ DAYS | | |
| Review P-Track for completeness and review scope provided to confirm the proper procurement approach | X | |
| Assign or reject P-Track based on completeness of requirements | X | |
| Work with requesting department on any clarifications | X | X |
| Use appropriate template to draft proposal document and create timeline | X | |
| PHASE 2 – Proposal Posted – 45+ DAYS | | |
| Finalize RFP document and send to department for review | X | |
| Department review and approval | | X |
| Request final evaluation team information from the department | X | X |
| Prepare RFP document for posting on PB | X | |
| Post RFP on PB (Standard period of time is 30 days) | X | |
| Send invitations to department staff for proposal evaluation | X | |
| Track and manage the RFP | X | |
| Pre-proposal meeting (if necessary) | X | X |
| Manage vendor questions and Request for Information (RFI) | X | |
| Provide responses to vendor questions | | X |
| Prepare/post addenda | X | |
| PHASE 3 – Proposal Close – 14+ DAYS | | |
| Download and review all proposals | X | |
| Investigate Protests | X | X |
| Verify vendor information and determine if vendor proposals are responsive/responsible | X | X |
| Work on any exceptions proposed to City's terms and conditions (Legal approve "as to form") | X | X |
| PHASE 4 – Proposal Evaluation – 21+ DAYS | | |
| Prepare the evaluation score sheet, proposals, and cost file as applicable. Exceptions for grant funded items. | X | |
| Evaluation team reviews and scores all proposals submitted | | X |

| | | |
|--|---|---|
| Conduct Interviews (if needed) | X | X |
| Ask for clarification on submitted proposals from vendor (if needed) | | X |
| Negotiations - pricing or scope of work | | X |
| Negotiations – Contract/Exceptions - any exceptions proposed to City's terms and conditions (Legal approve "as to form") | X | |
| Clarifications, protests, interviews, references | X | X |
| PHASE 5 – Proposal Award – 14+ DAYS | | |
| Review and file all score sheets and cost file | X | |
| Vendor/Consultant selection | | X |
| Vendor registration | X | |
| Notify vendors and post results on PB (upon PO issuance) | X | |
| Prepare Notice of Intent to Award Letter (NOI) requiring the Vendor to provide Insurance within 14 days of receipt (Verification of Insurance) | X | |
| PHASE 6 – Contract Approval/Award – 30+ DAYS | | |
| Develop contract | X | |
| Contract review/approval | | X |
| Route contract for signatures | X | |
| Contract compliance and audit functions (insurance) | X | X |
| Prepare Staff Report for City Council (if necessary) | | X |
| Review Staff Report in Agenda Mgt. System (if necessary) | X | |
| Council Approval/Presentation (if necessary) | | X |
| Notice of Award | X | X |
| PHASE 7 – PO Issuance - 14+ DAYS | | |
| Verification of all City requirements for PO (insurance, BL, SAM etc.) | X | |
| Creation of PO | X | |
| Review/Approve PO | | X |
| Notice to Proceed | | X |
| Post results on PB (update status to "Award") | X | |

The timeline provided above should be completed within 5-7 months from the Draft Proposal phase to the PO issuance phase. The specific number of days will be adjusted accordingly based on the department's needs and the complexity of the purchasing process. These timelines are approximate, and it's important to remain flexible to accommodate unforeseen circumstances that may arise during the purchasing process.

APPENDIX G: PURCHASING ALTERNATIVE BIDDING “SIMPLIFIED PRICING” CHECKLIST & PHASES



PURCHASING ALTERNATIVE “SIMPLIFIED PRICING” BIDDING CHECKLIST

CONTACT INFORMATION

- ☐ Requestor Name
- ☐ Phone Extension Number
- ☐ Date
- ☐ Requestors Title
- ☐ Department/Division
- ☐ Date of Request

PROJECT INFORMATION

- ☐ Request Type, Select one
 - Please select from list --
 - Agreement/Contract Amendment
 - Bid/RFP
 - Blanket Purchase Order
 - Change Order (CO)
 - Insurance
 - New Agreement/Contract
 - Project P Purchase Order
 - Purchasing Advice
 - Release Purchase Order (RPO)
- ☐ Category, Select one
 - Please select from list --
 - Professional Services
 - Maintenance and General Services
 - Materials, Supplies and Equipment
 - Construction
 - Other
- ☐ Requesting Manager
- ☐ Project Name
- ☐ Description of the Project

TIMELINES

- ☐ Date Needed
- ☐ Fiscal Year

BUDGET

- ☐ Encumber PO – Y/N
- ☐ Estimated Value – Approved by the Project Manager/Engineer
- ☐ Account Information – GL/JL Key
- ☐ Budgeted Amount

ATTACHMENTS

- ☐ Scope of Work/Services including but not limited to:
 - ☐ Introduction and General Project Information
 - ☐ Detailed Task Description work to be done by the consultant/contractor
 - ☐ Constraints on the consultant/contractor, Ordinances and security control, worksite conditions
 - ☐ Consultant/contractor personnel requirements and qualifications
 - ☐ Consultant/contractor responsibilities, Quality control, service complaints, work schedule
 - ☐ Special funding requirements, Grant requirements
 - ☐ Evaluation of consultant/contractor performance, performance standards
 - ☐ Reporting requirements and procedures, Task completion dates, timelines, milestones

- ☐ Special conditions, Term of Contract, Payment procedures, insurance, bonds, contract extensions, renewal
- ☐ Exhibits, Technical Reports, maps, drawings, schedules, photographs
- ☐ For Public Projects drawings need to be signed by Public Works (City Engineer and Assistant City Engineer)
- ☐ Bid Schedule
- ☐ Quotes (Quote Analysis Worksheet and Vendor Acknowledgment Form)
- ☐ Other supporting documents
- ☐ Form W9 if applicable for new vendors

NOTES AND COMMENTS

- ☐ Provide internal information for the buyer
- ☐ Approval workflow code (Sec Code)

FUNDING CHECK

- ☐ Are the funds available?
- ☐ Provide grant funding source and requirements

PURCHASING PHASES MATRIX (Alternative “Simplified Pricing” Bidding)

***NOT TO EXCEED \$75K**

| TASK | RESPONSIBILITY: | |
|---|------------------|------------------------------------|
| | PURCHASING STAFF | PROJECT MANAGER |
| Receive Quotes | | |
| Produce Scope of Work (SOW) for commodity or service | | X |
| If on-site services, Agreement is needed | | X Include copy of our agreement |
| Provide SOW to three vendors and obtain 3 written or verbal price quotes (For verbal quotes, list date, time, and contact name) | | X |
| Complete the quote analysis worksheet | | X |
| Determine which quote is in the best interest of the City | | X |
| Complete the Vendor Acknowledgment Form | | X |
| PHASE 1 – P-Track Compliance Review – 7+ DAYS | | |
| P-Track submitted including all supporting documents per checklist | | X |
| Assign or reject P-Track based on completeness of requirements | X | |
| Work with requesting department on any clarifications | X | X |
| Verify information and determine if vendor quotes are responsive/responsible | X | |
| Determine if an Agreement is needed | X | |
| PHASE 2 – Contract Approval – 21+ DAYS | | |
| Develop contract (if applicable) | X | |
| Contract review/approval | | X |
| Route contract for signatures | X | |
| Review and approve Contract compliance and audit functions (insurance) | X | X |
| PHASE 3 – PO Issuance - 14+ DAYS | | |
| Verification of all City requirements for PO (insurance, BL, SAM, etc.) | X | |
| Creation of PO | X | |
| Review/Approve PO | | X |

The timeline provided above should be completed within 30-45 days from the time a P-Track is submitted to start Phase 1 through the PO issuance to complete Phase 4. The specific number of days will be adjusted accordingly based on the department's needs and the complexity of the purchasing process. These timelines are approximate, and it's important to remain flexible to accommodate unforeseen circumstances that may arise during the purchasing process.

APPENDIX H: PURCHASING NEW AGREEMENT CHECKLIST & PHASES



NEW AGREEMENT REQUEST CHECKLIST

CONTACT INFORMATION

- ☐ Requestor Name and Title
- ☐ Department/Division
- ☐ Phone Extension Number
- ☐ Requesting Manager
- ☐ Date of Request

PROJECT INFORMATION

- ☐ Request Category
 - ☐ Professional Services
 - ☐ Maintenance and General Services
 - ☐ Construction
 - ☐ Other
- ☐ Project Name
- ☐ Project Description

TIMELINES

- ☐ Date and fiscal year needed
- ☐ If applicable, share any other important dates [on](#) the comments

BUDGET

- ☐ Encumber PO – Y/N
- ☐ Estimated Value – Approved by the Project Manager/Engineer
- ☐ Account Information – GL/JL Key
- ☐ Budgeted Amount
 - ☐ Reference RFP or NIB
- ☐ Funding Check – funding is available source/requirements

ATTACHMENTS

- ☐ Quote(s)
- ☐ Scope of Work/Service(s)
 - ☐ Detailed Task Description work to be done by the consultant/contractor.
 - ☐ Constraints on the consultant/contractor, Ordinances and security control, worksite conditions
 - ☐ Consultant/contractor personnel requirements and qualifications
 - ☐ Consultant/contractor responsibilities, Quality control, service complaints, work schedule
 - ☐ Special funding requirements, Grant requirements
 - ☐ Reporting requirements and procedures, Task completion dates, timelines, milestones
 - ☐ Special conditions, Term of Contract, Payment procedures, insurance, bonds, contract extensions, renewal, prevailing wage
 - ☐ Updated pricing/rate sheet
- ☐ If applicable
 - ☐ ETB, Staff Report, and/or W9 – for new vendors
- ☐ Other supporting documents
 - ☐ Provide internal information for the specialist/buyer
 - ☐ Approval workflow code (Sec Code)

PURCHASING PHASES MATRIX (New Agreement)

| TASK | RESPONSIBILITY: | |
|--|------------------|-----------------|
| | PURCHASING STAFF | PROJECT MANAGER |
| Receive Quotes | | |
| Produce Scope of Work (SOW) for the requested service | | X |
| Informal Procurements (\leq \$75,000) Provide SOW and model agreement (M/GSA or PSA) to three vendors and obtain 3 written or verbal price quotes (For verbal quotes, list date, time, and contact name) | | X |
| Complete the quote analysis worksheet | | X |
| Determine which quote is in the best interest of the City | | X |
| *Prepare ETB, Staff Report if applicable | | X |
| PHASE 1 – P-Track Compliance Review – 7+ DAYS (After Assigned) | | |
| P-Track submitted including all supporting documents per checklist | | X |
| Assign or reject P-Track based on completeness of requirements | X | |
| Work with requesting department on any clarifications | X | X |
| Verify information and determine if vendor quotes are responsive | X | |
| PHASE 2 – Contract Approval – 21+ DAYS | | |
| Determine contract type. Develop contract and complete peer review. <ul style="list-style-type: none"> Professional Services Maintenance and General Services Construction Letter Agreement Performer Agreement | X | |
| Department Contract review/approval | | X |
| Route contract for vendor and purchasing signatures | X | |
| Review and approve Contract compliance and audit functions (insurance) | X | X |
| PHASE 3 – PO Issuance - 14+ DAYS | | |
| Verification of all City requirements for PO (insurance, BL, SAM, etc.) | X | |
| Creation of PO | X | |
| Review/Approve PO | X | X |

The timeline provided above should be completed within 30-45 days from the time a P-Track is submitted to start Phase 1 through the PO issuance to complete Phase 3. The specific number of days will be adjusted accordingly based on the department's needs and the complexity of the purchasing process. These timelines are approximate, and it's important to remain flexible to accommodate unforeseen circumstances that may arise during the purchasing process such as delays in obtaining required insurance endorsements and receipt of bonds, as applicable.

APPENDIX I: QUOTE ANALYSIS WORKSHEET

| Quote Analysis Worksheet (QAW) | | | | | | | |
|---|------------------------------------|---|-----------|------------|-----------|------------|-----------|
| Requesting Department | | Vendor | Vendor #1 | Vendor #2 | | Vendor #3 | |
| Finance | | | | | | | |
| Requester Name | | Quote No. | | | | | |
| TAXABLE ITEMS | | Quote Date | | | | | |
| Description/Make/Model/Part No. | Qty | Unit Price | Ext Price | Unit Price | Ext Price | Unit Price | Ext Price |
| What are we asking for the vendor to provide? | | | | | | | |
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| | | | | | | | |
| Subtotal | | | | | | | |
| NON-TAXABLE ITEMS | | Sales Tax 8.75% | | | | | |
| Labor Fees | | | | | | | |
| Installation Fees | | | | | | | |
| Warranty | | | | | | | |
| Training | | | | | | | |
| Shipping/Delivery Fees | | | | | | | |
| Other Fees | | | | | | | |
| Total | Overall Lowest Bidder = Green Cell | | | | | | |
| Vendor Acknowledgments | | | | | | | |
| Insurance Requirements (services only) | | | | | | | |
| Bond Requirements (services only) | | | | | | | |
| Business License (services and materials) | | | | | | | |
| Prevailing Wage Requirements (services only) | | | | | | | |
| Standard City Agreement (services only) | | | | | | | |
| QAW Corona | City of Corona | When obtaining quotes department is responsible for identifying any prevailing wage or bond requirements. For all on-site services department must provide a copy of the City's standard model agreement. | | | | | |

APPENDIX J: VENDOR ACKNOWLEDGMENT FORM



City of Corona
Vendor Acknowledgment Form (Services)

| | |
|------------------------|--|
| Project Description: | |
| Purchase Description: | |
| Staff Name: | |
| Department: | |
| Vendor Name: | |
| Vendor Contact Person: | |
| Vendor Phone Number: | |
| Vendor Email: | |

Acknowledgment of Requirements

By signing below, the undersigned vendor acknowledges that they have received, reviewed, and can comply with the following requirements as applicable to the City of Corona's procurement and contracting process:

- ☐ City's Standard Agreement
- ☐ Insurance Requirements
- ☐ Business License
- ☐ Bond Requirements (if applicable)
- ☐ Prevailing Wage Requirements (if applicable)

Certification

I certify that I am an authorized representative of the above-named vendor and that our company can meet all requirements indicated above.

Authorized Representative Name: _____

Title: _____

Signature: | _____

Date: _____

APPENDIX K: RECYCLED PRODUCT PREFERENCE POLICY

Pursuant to CMC Section 3.08.080 (K) and CMC Section 8.20.400 (A), this policy applies to the City's informal and formal bidding procedures for the procurement of paper products described in section B below.

A. The following definitions apply to this policy:

“Paper products” include, but are not limited to, paper janitorial supplies, cartons, wrapping, packaging, file folders, hanging files, corrugated boxes, tissue, and toweling.

“Postconsumer material”, as defined in PCC section 12200(e), comes from products that were bought by consumers, used, and then recycled. For example, a newspaper that has been purchased and read, recycled, then used to make another product would be postconsumer material.

“Printing and writing papers” include, but are not limited to, copy, xerographic, watermark, cotton fiber, offset, forms, computer printout paper, white wove envelopes, manila envelopes, book paper, note pads, writing tablets, newsprint, and other uncoated writing papers, posters, indexcards, calendars, brochures, reports, magazines, and publications.

“Recycled-content paper” means paper products and printing and writing paper that consists of at least 30 percent, by fiber weight, postconsumer material.

“Recyclable materials” means paper, glass, cardboard, plastic, used motor oil, ferrous metal, aluminum, construction and demolition debris and any other solid waste material which is capable of being recycled or reused, whether generated from or at residential or commercial premises, which have been segregated from solid waste materials for the purpose of depositing at a designated collection location, including a curbside location, for collection and transportation to the designated recycling facility.

B. Paper products. All vendors providing paper products and printing, and writing paper to the city shall:

- (1) If fitness and quality are equal, provide recycled-content paper products and recycled-content printing and writing paper that consists of at least 30 percent, by fiber weight, postconsumer material instead of non-recycled products whenever recycled paper products and printing and writing paper are available at the same or lesser total cost than non-recycled items or at a total cost of no more than 10% of the total cost for non-recycled items.
- (2) Certify in writing, the minimum percentage of postconsumer material in the paper products and printing and writing paper offered or sold to the city. This certification requirement may be waived if the percentage of postconsumer material in the paper products, printing and writing paper, or both can be verified by a product label, catalog, invoice, or a manufacturer or vendor internet website.

- (3) Certify in writing, on invoices or receipts provided, that the paper products and printing and writing paper offered or sold to the city is eligible to be labeled with an unqualified recyclable label as defined in 16 Code of Federal Regulations (CFR) § 260.12 (2013).
- (4) Provide records to the City's Recycling Program Analyst, in accordance with the city's recycled-content paper procurement policy(ies) of all paper products and printing and writing paper purchases within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by any division or department or employee of the city. Records shall include a copy (electronic or paper) of the invoice or other documentation of purchase, written certifications as required in §8.20.390(B)(2) and §8.20.390(B)(3) for recycled-content purchases, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-recycled content paper products or printing and writing papers are provided, include a description of why recycled-content paper products or printing and writing papers were not provided.

APPENDIX L: LANDSCAPING ORGANIC WASTE POLICY

Pursuant to CMC Section 8.20.400 (A) this policy applies to the City's informal and formal bidding procedures for the procurement of landscaping services described in section B below.

A. The following definitions apply to this policy:

"Compost" means the product resulting from the controlled biological decomposition of organicsolid wastes that are source separated from the municipal solid waste stream, or which are separated at a centralized facility.

"Green waste" means shrubbery, tree trimmings, yard waste, grass, weeds, straw or leaves, woodchips and other household garden organic materials.

B. **"Landscaping"** Any person that provides services directly to the city for landscaping maintenance, renovation, and construction shall:

(1) Use compost and mulch, as practicable, produced from recovered organic waste, for all landscaping renovations, construction, or maintenance performed for the city, whenever available, and capable of meeting quality standards.

(2) Keep and provide to the city records of procurement of recovered organic waste products (either through purchase or acquisition), upon completion of projects. Information to be provided shall include:

(a) General description of how and where the product was used;

(b) Source of product, including name, physical location, and contact information for each entity, operation, or facility from whom the recovered organic waste products were procured;

(c) Type of product;

(d) Quantity of each product; and,

(e) Invoice or other record demonstrating purchase or procurement.

APPENDIX M: INSURANCE MATRIX

Pending Item

APPENDIX N: CORONA MUNICIPAL CODE (CMC) CHAPTER 3.08 PURCHASING

Please see the attached Document.

ORDINANCE NO. 3419

AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF CORONA, CALIFORNIA, AMENDING CHAPTER 3.08 OF THE CORONA MUNICIPAL CODE TO UPDATE AND STREAMLINE THE CITY'S PURCHASING REGULATIONS

WHEREAS, Chapter 3.08 of the Corona Municipal Code ("CMC") sets forth the purchasing regulations for all City purchases; and

WHEREAS, the City Council of the City of Corona ("City Council") desires to make certain changes to such regulations as provided for herein.

NOW THEREFORE, THE CITY COUNCIL OF THE CITY OF CORONA, DOES ORDAIN AS FOLLOWS:

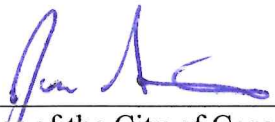
SECTION 1. Chapter 3.08 (Purchasing Regulations) of Title 3 (Revenue and Finance) of the Corona Municipal Code is hereby amended in its entirety to read as provided for in Exhibit "A" attached hereto and incorporated herein by reference.

SECTION 2. CEQA Findings. The City Council finds that this Ordinance is exempt pursuant to Section 15061(b)(3) of the Guidelines for the California Environmental Quality Act (CEQA), which states that a project is exempt from CEQA if the activity is covered by the general rule that CEQA applies only to projects that have the potential for causing a significant effect on the environment. Where it can be seen with certainty that there is no possibility that the activity in question may have a significant effect on the environment, the activity is not subject to CEQA. This Ordinance merely amends the Corona Municipal Code to update the City's purchasing regulations. Thus, there is no possibility that adopting this Ordinance will have a significant effect on the environment and no further environmental analysis is required.

SECTION 3. Invalidity; Severability. If any sentence, cause or phrase of this Ordinance is for any reason held to be unconstitutional or otherwise invalid, such decision shall not affect the validity of the remaining provisions of this Ordinance.


SECTION 4. Effective Date of Ordinance. The Mayor shall sign this Ordinance and the City Clerk shall attest thereto and shall within fifteen (15) days of its adoption cause it, or a summary of it, to be published in a newspaper of general circulation in the City of Corona. This Ordinance shall take effect and be in force on the 30th day after its adoption.

PASSED, APPROVED AND ADOPTED this 3rd day of September, 2025.



Mayor of the City of Corona, California

ATTEST:


for _____
City Clerk of the City of Corona, California

CERTIFICATION

I, Sylvia Edwards, City Clerk of the City of Corona, California, do hereby certify that the foregoing Ordinance was regularly introduced at a regular meeting of the City Council of the City of Corona, California duly held on the 20th day of August, 2025 and thereafter at a regular meeting held on 3rd day of September, it was duly passed and adopted by the following vote:


AYES: CASILLAS, DADDARIO, RICHINS, SPEAKE, STEINER

NOES: NONE

ABSENT: NONE

ABSTAINED: NONE

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the official seal of the City of Corona, California, this 3rd day of September.


for _____
City Clerk of the City of Corona, California

[SEAL]

EXHIBIT “A”

**CMC CHAPTER 3.08
(PURCHASING REGULATIONS)**

[SEE ATTACHED TWENTY-THREE (23) PAGES]

CHAPTER 3.08 PURCHASING REGULATIONS

Sections

| | |
|----------|--|
| 3.08.010 | Definitions. |
| 3.08.020 | Centralized purchasing division and purchasing system. |
| 3.08.030 | Purchasing agent. |
| 3.08.040 | General purchasing regulations, policies, and procedures. |
| 3.08.050 | Bidding requirements - public projects. |
| 3.08.060 | Bidding requirements - maintenance and general services. |
| 3.08.070 | Bidding requirements - professional services. |
| 3.08.080 | Bidding requirements - materials, supplies, and equipment. |
| 3.08.090 | Public projects - formal bidding procedure. |
| 3.08.100 | Public projects - informal bidding procedure. |
| 3.08.110 | Non-public projects - formal bidding procedure. |
| 3.08.120 | Non-public projects - informal bidding procedure. |
| 3.08.125 | Non-public projects - public agency alternative competitive bidding procedure. |
| 3.08.130 | Exceptions to competitive bidding - public projects |
| 3.08.140 | Exceptions to competitive bidding - non-public projects. |
| 3.08.160 | Surplus materials, supplies, and equipment. |

3.08.010 Definitions.

Unless otherwise indicated, the following definitions shall apply to all provisions of this chapter:

(A) **“Act”** means the Uniform Public Construction Cost Accounting Act found at Cal. Public Contract Code, §§ 22000 et seq.

(B) **“Alternative procedure”** means purchasing materials, supplies, services, (professional, consulting, public works, maintenance, and other general services) or equipment by negotiated contract, purchase order or any other procedure outlined in the city’s Purchasing Policies and Procedures Manual approved by the City Manager and consistent with this chapter. A type of alternative procedure may include, but is not limited to, what will be referred to as a "simplified pricing procedure" wherein the authorized contracting party, or his or her designee, obtains oral price quotes from one or more potential contractors or suppliers, and accepts the quote which is determined to be in the best interests of the city.

(C) **“Authorized contracting party”** means the city official or body provided with authority under this chapter to approve or award a contract or to make a purchase, as well as to reject all bids when appropriate. Unless otherwise stated, the party authorized to approve or award a contract or to make a purchase shall have the authority to execute the associated purchase order, contract, and/or agreement.

(D) **“City Engineer”** means either the City Engineer or the person delegated by the

City Engineer to perform all or some of the duties prescribed in this chapter.

(E) **"City Manager"** means the City Manager or person designated by the City Manager to perform all or some of the duties prescribed in this chapter.

(F) **"Commission"** means the California Uniform Construction Cost Accounting Commission created by Division 2, Part 3, Chapter 2, Article 2, of the Cal. Public Contract Code (commencing at § 22010).

(G) **"Corona formal bidding procedure"** means a procedure which meets the requirements of state and local law, including the Act, this chapter, and the city's Purchasing Policies and Procedures Manual.

(H) **"Emergency"** for purposes of public projects shall have that meaning provided in Cal. Public Contract Code §§ 1102, 22035 and 22050. **"Emergency"** for all other purchasing or contracting purposes means a situation which makes competitive bidding, either formal or informal, impractical or not in the best interests of the city.

(I) **"Facility"** means any plant, building, structure, ground facility, utility system (subject to the limitation found in Cal. Public Contract Code § 22002, subdivision (c)(3)), real property, streets and highways, or other public work improvement.

(J) **"Force account"** means the city's performing of a project using its own employees.

(K) **"General services"** means all services performed by persons not in a professional occupation including, but not limited to, contract services for park, electrical, and computer repair, building, facility, and vehicle maintenance, recreation programs, and other similar services which are not typical of professional services.

(L) **"Maintenance work"** shall have that meaning provided in § 22002(d) of the Act, as that section may be amended from time to time. In addition and to the extent not inconsistent with § 22002(d), **"maintenance work"** shall include, but shall not be limited to, the following:

(1) Routine, recurring, and usual work for the preservation or protection of any publicly-owned or publicly-operated facility for its intended purposes.

(2) Minor repainting.

(3) Street and highway maintenance including utility patching, skin patching, crack filling, filling of pot holes, slurry sealing, edge grading, street striping, resurfacing of streets and highways at less than one-inch, sign replacement, sidewalk repair and replacement, curb and gutter repair and replacement, and street and traffic light repair and replacement. "Maintenance work" shall not include striping of a new street or highway.

(4) Sewer maintenance including foaming, video taping, cleaning, and manhole

restoration.

(5) Traffic signal maintenance. Maintenance work shall not include installation of new traffic signals.

(6) Storm drain related maintenance.

(7) Landscape maintenance, including mowing, watering, trimming, pruning, planting, tree and plant replacement, irrigation and sprinkler system servicing, retrofit and repair, and landscape rehabilitation.

(8) Maintenance of facilities including roof repairs or replacements, heating and air conditioning repairs, and electric repairs.

(9) Vehicle and equipment maintenance and repairs.

(10) Work performed to keep, operate, and maintain publicly-owned water, power, or waste disposal systems including, but not limited to, dams, reservoirs, powerplants, and electrical transmission lines of 230,000 volts and higher.

(M) **"Non-public project"** shall mean any type of purchase other than for a "public project" as defined in Section 3.08.010 (Q) below. For instance, a "non-public project" includes maintenance work (Section 3.08.010 (L)), general services (Section 3.08.010(K)), professional services (Section 3.08.010 (P)), and materials, supplies, and equipment.

(N) **"Non-public project formal bidding procedure"** means a procedure which meets the requirements of state and local law, including this chapter and the Purchasing Policies and Procedures Manual.

(O) **"Non-public project informal bidding procedure"** means a procedure which meets the requirements of state and local law, including this chapter and the Purchasing Policies and Procedures Manual.

(P) **"Professional services"** means all services performed by persons in a professional occupation including, but not limited to, consulting and performance services for accounting, auditing, computer hardware and software support, engineering, architectural, planning, environmental, redevelopment, financial, economic, personnel, social services, animal control, legal, management, cable television, communication, and other similar professional functions which may be necessary for the operation of the city.

(Q) **"Public project"** shall have that meaning provided in § 22002(c) of the Act, as that section may be amended from time to time. A "public project" shall not include maintenance work. In addition and to the extent not inconsistent with § 22002(c), "public project" shall include, but shall not be limited to, the following:

(1) Construction, reconstruction, erection, alteration, renovation, improvement, demolition, and repair work involving any publicly-owned, leased, or operated facility.

(2) Painting or repainting of any publicly-owned, leased, or operated facility;
and

(3) In the case of a publicly-owned “electric” utility system, “public project” shall include only the construction, erection, improvement, or repair of dams, reservoirs, powerplants, and electrical transmission lines of 230,000 volts and higher.

(R) **“Public project formal bidding procedure”** means a procedure which meets the requirements of state and local law, including § 22037 of the Act, this chapter, and the Purchasing Policies and Procedures Manual.

(S) **“Public project informal bidding procedure”** means a procedure which meets the requirements of state and local law, including § 22034 of the Act, this chapter, and the Purchasing Policies and Procedures Manual.

(T) **“Purchasing agent”** means the City Manager or his or her designee(s) as provided in § 3.08.030. Pursuant to § 3.08.030, the City Manager may change his or her designation at any time.

(U) **“Department Director”** means the person in charge of a particular department of the city, and shall include the Assistant City Manager, the Utilities Director, the Chief of Police, and the Fire Chief.

(V) **“On-call maintenance work or general services”** means maintenance work or general services to be provided on an on-call or as-needed basis pursuant to a master agreement or contract.

3.08.020 Centralized purchasing division and purchasing system.

The purpose of this chapter is to establish efficient procedures for the purchase of materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment at the lowest possible cost commensurate with quality needed, to exercise positive financial control over purchases, to clearly define authority for the purchasing function, and to assure the quality of purchases. In addition, this chapter and the purchasing system it establishes are designed to provide appropriate procedures to implement the city's participation in the Uniform Public Construction Cost Accounting Act pursuant to Cal. Public Contract Code, §§ 22000 et seq.

A centralized purchasing division and purchasing system are hereby adopted and vested with the authority to govern the purchase of all city materials, supplies, services (professional, consulting, public works, maintenance and other general services), and equipment.

3.08.030 Purchasing agent.

There is created the position of purchasing agent. The purchasing agent shall be the City Manager or his or her designee. Initially, the City Manager designates the Finance Director to act as the purchasing agent. The City Manager may change his or her designation at any time. The duties of the purchasing agent may be combined with those of any other city office or position. The purchasing agent may delegate the duties of that position to one or more employees with the consent of the City Manager.

The purchasing agent shall be the head, and have the general supervision of all purchasing functions of the city. The purchasing agent shall direct and supervise the city's purchasing program. The purchasing agent shall endeavor to obtain full and open competition as provided herein and in the Purchasing Policies and Procedures Manual. The purchasing agent shall establish methods and procedures for the efficient and economical functioning of the purchasing division.

Subject to the supervision of the City Manager, the purchasing agent shall have the authority to:

(A) **Purchase and contract.** Purchase or contract for materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment required by the city.

(B) **Negotiate and recommend.** Negotiate and recommend to the City Council execution of contracts for the purchase of materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment.

(C) **Purchasing Policies and Procedures Manual.** Prepare and implement policies and procedures governing the bidding, contracting, purchasing, storing, distribution, and disposal of materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment for the city. To this end, the purchasing agent shall be responsible for developing and obtaining City Manager approval of a Purchasing Policies and Procedures Manual, which shall outline the policies and procedures necessary to implement the regulations of this Chapter 3.08. Upon approval by the City Manager, the Purchasing Policies and Procedures Manual shall have the same force and effect as the provisions of this Chapter 3.08.

(D) **Forms.** Prescribe and maintain such forms as may be reasonably necessary to the implementation of this chapter and the city's Purchasing Policies and Procedures Manual.

(E) **Review plans and specifications.** Review, or provide for the review of, the working details, drawings, plans, and specifications for any projects or purchases requiring such review in this chapter.

(F) **Inspections and testing.** Inspect, supervise, or provide for the inspection and supervision of, purchased materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment to ensure conformity with any specifications established or required by the city. The purchasing agent or his or her designee shall have authority to require appropriate testing of items delivered or samples to determine their

quality and conformance with the specifications. Samples of items, when required, shall be furnished free of expense to the city and, if not destroyed by test, will be returned upon request at the bidder's expense.

(G) **Surplus materials, supplies, and equipment:** As provided for in § 3.08.150 below, transfer, sell, exchange, or trade any materials, supplies, or equipment deemed to be surplus.

(H) **Bidder, contractor, and vendor lists and catalogs.** Develop and maintain, or provide for the development and maintenance of, any bidder's list, contractor's list, or vendor's list and catalog file necessary to the operation of this chapter and the city's Purchasing Policies and Procedures Manual. Each city department may have its own lists or catalogs. If the purchasing agent delegates the obligation to develop and maintain any list to another city employee, the purchasing agent shall retain final oversight authority and approval regarding how the list is developed and maintained.

(I) **Delegation of purchasing agent authority.** Provide written authorization to any department director to conduct a bidding process outside of the centralized purchasing system; provided, however, that such bidding process and the resulting contract or purchase shall otherwise comply with the requirements of this chapter. The purchasing agent may rescind such authorization in writing at any time and for any or no reason.

3.08.040 General purchasing regulations, policies, and procedures.

(A) **Applicability of chapter.** The purchasing regulations contained in this Chapter 3.08 shall apply to the purchase of materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment.

(B) **Basis of Awards.** The city shall secure materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment at the greatest overall value to the city, commensurate with the quality and scope needed, subject to any limitations imposed by state law, and through awards to the lowest responsive and responsible bidder where required by this chapter. Notwithstanding the foregoing, although the city is not adopting the formal procedures outlined in Cal. Gov't Code §§ 4525 et seq., the city shall secure professional services based upon demonstrated competence, professional qualifications, and suitability for the project in general. The city may consider cost of professional services if the authorized contracting party determines it to be a relevant factor under the circumstances. When an award pursuant to this chapter is to be made in the best interests of the city, staff shall take into account cost, demonstrated competence, qualifications, suitability for the project in general, and other factors that the authorized contracting party determines to be a relevant factor under the circumstances.

(C) **Purchasing Policies and Procedures Manual.** The purchasing agent shall develop a Purchasing Policies and Procedures Manual, as provided for in Section 3.08.030(C) above. The Purchasing Policies and Procedures Manual shall be written and implemented in such a way to

encourage open and competitive bidding, where appropriate, provide equal opportunity based on merit, make each selection process free of invidious discrimination, provide for efficient and timely acquisition of needed materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment, and provide effective fiscal controls.

(D) **Competitive bidding.** In purchasing, materials, supplies, services (professional, consulting, public works, maintenance, and other general services), and equipment, the city shall make use of competitive bidding, both formal and informal, whenever required by law, this chapter, or the city's Purchasing Policies and Procedures Manual. Formal and informal competitive bidding is not required, for instance, when an "emergency" is declared pursuant to this chapter.

(E) **Unencumbered funds.** The purchasing agent shall not issue a purchase order for materials, supplies, services (professional, consulting, public works, maintenance, and other general services), or equipment involving any project or purchase without an unencumbered appropriation in the fund account against which such purchase is to be charged except for the following:

- (1) In cases of emergency;
- (2) When specifically authorized by resolution or minute order of the City Council;
- (3) When the purchasing department acquires inventory for the warehouse that is not yet assigned to any department or fund; and
- (4) When using limited purchase orders, yearly purchase orders, or blanket purchase orders, as those terms are defined in the Purchasing Policies and Procedures Manual.

(F) **Requisition forms.** The department responsible for a purchase shall submit requests for materials, supplies, services (professional, consulting, public works, maintenance, and other general services), or equipment to the purchasing agent by standard requisition forms, or by other means as may be established by the Purchasing Policies and Procedures Manual.

(G) **Applicable state and federal law:** The city shall comply with all applicable federal and state laws for the particular purchase at issue including, but not limited to, bidder's security and bonding requirements, as well as prevailing wage requirements.

(H) **Purchase orders; contract and agreement forms.** The purchasing agent shall require all purchases for materials, supplies, services (professional, consulting, public works, maintenance, and other general services), or equipment to be made with an appropriate purchase order and on an appropriate contract or agreement, the form of which shall be approved by the City Attorney. The City Attorney shall not need to review and approve as to form each executed contract or agreement; provided a city model approved as to form by the City Attorney is used without substantive modification. In addition, when the purchasing agent determines that issues under the responsibility of the city's risk manager are involved, the relevant contract or agreement

provisions shall also be reviewed and approved by the city's risk manager.

(I) **Unlawful purchasing activities and conflicts.** The Purchasing Policies and Procedures Manual shall specifically prohibit practices which might result in unlawful activity including, but not limited to, rebates, kickbacks, or other unlawful consideration, and shall specifically prohibit city officials, officers, and employees from participating in the bidding or selection process when they have a relationship with a person or business entity seeking a contract under this Chapter 3.08 which would subject the officials, officers, or employees to the prohibitions of Cal. Gov't Code §§ 1090 and 87100 et seq.

(J) **Records retention.** The purchasing agent shall comply with the Records Retention Schedule duly adopted by the City Council for the Finance Department.

(K) **State or federal funding.** Any purchases made with state or federal funds shall comply with all laws, rules, and regulations made applicable by the funding source.

(L) **Delegation of department director authority.** The department directors, with approval of the City Manager, may provide written authorization to any subordinate employees to exercise the director's purchasing authority; provided, however, that such delegation shall be pursuant to the process provided for in the city's Purchasing Policies and Procedures Manual. The department directors, with approval of the City Manager, may rescind such delegation in writing at any time and for any or no reason. As used herein and as provided for in § 3.08.010, the term department director shall include the Assistant City Manager and the Utilities Director, the Chief of Police, and the Fire Chief.

(M) **Quarterly Reporting (\$75,001 to \$125,000 Purchases).** No less often than quarterly, a written report shall be presented to the City Council which lists purchases, contracts or agreements authorized by the City Manager, or his or her designee, between \$75,001 to \$125,000. The report shall include the dollar amount, date, approving employee title, brief description of services or items purchased, and the vendor, contractor or other entity.

3.08.050 Bidding requirements - public projects.

(A) **\$75,000 or less.** Public projects which are equal to or less than \$75,000 may be awarded by the director of the department responsible for the project, or his or her designee, by any alternative procedure.

(B) **\$75,001 - \$125,000.** Public projects which are greater than \$75,000, but less than or equal to \$125,000, may, except as otherwise provided in this chapter or the Act, be awarded by the City Manager, or his or her designee, pursuant to the public project informal bidding procedure. If all bids received are over the amount provided for in Section 22032(b) of the Act (currently \$220,000), the City Council may, with the approval of a four-fifths vote of those members present and without following the public project formal bidding procedure, award the contract in an amount not exceeding the amount provided for in Section 22034(d) of the Act (currently \$235,000)

to the lowest responsive and responsible bidder, so long as the City Council also determines that the city's cost estimate for the project was reasonable.

(C) **\$125,001 - \$220,000.** Public projects which are greater than \$125,000, but less than or equal to the amount provided for in Section 22032 (a) of the Act (currently \$220,000), may, except as otherwise provided in this chapter or the Act, be awarded by the City Council pursuant to the public project informal bidding procedure. If all bids received are over the amount provided for in Section 22032(b) of the Act (currently \$220,000), the City Council may, with the approval of a four-fifths vote of those members present and without following the public project formal bidding procedure, award the contract in an amount not exceeding the amount provided for in Section 22034(d) of the Act (currently \$235,000) to the lowest responsive and responsible bidder, so long as the City Council also determines that the city's cost estimate for the project was reasonable.

(D) **More than \$220,000.** Public projects which are greater than the amount provided for in Section 22032(b) of the Act (currently \$220,000), may, except as otherwise provided in this chapter or the Act, be awarded by the City Council pursuant to the public project formal bidding procedure.

(E) **City Engineer review of plans and specifications.** The City Engineer shall review and approve the working details, drawings, plans, and specifications prepared for every public project which may affect the design or operation of public improvements and which may bring into question the city's liability for dangerous conditions of public property.

(F) **City Council review of plans and specifications.** The City Council shall review and approve the working details, drawings, plans, and specifications prepared for every public project approved by the City Council pursuant Sections 3.08.050 (C) and (D) above.

(G) **Award.** Contracts for public projects which are equal to or less than the amount provided for in Section 22032(a) of the Act (currently \$75,000), if awarded, may be awarded in the best interests of the city. Contracts for public projects which are greater than the amount provided for in Section 22032(a) of the Act (currently \$75,000), if awarded, shall be awarded to the lowest responsive and responsible bidder. If two or more bids are the same and the lowest, the authorized contracting party may accept the one it chooses.

(H) **Dollar limits and change orders or amendments.** For public projects awarded by staff pursuant to Sections 3.08.050 (A) or (B) above, unless an exception provided in § 3.08.130 below applies, any contract amendment or change order which would increase the contract amount above the amount provided for in Section Section 3.08.0750 (C) above, plus 10% of the original contract amount, shall be approved by the City Council. For public projects awarded by the City Council pursuant to Section 3.08.050 (C) or (D) above, unless a lower or higher amount is stated in the City Council staff report for the project or directed by the City Council, the City Manager or his or her designees shall have authority to approve contract amendments or change orders up to the lesser of either \$125,000 or 10% of the original contract amount.

(I) **No bid splitting.** The city shall not split a project, work, service, or purchase into smaller projects, works, services, or purchases for the purpose of avoiding any bidding or contracting requirements of this code.

3.08.060 Bidding requirements - maintenance and general services.

(A) **\$75,000 or less.** Maintenance work and other general services projects of \$75,000 or less, including those involving on-call maintenance work or general services, may be awarded by the director of the department responsible for the project, or his or her designee, by any alternative procedure.

(B) **\$75,001 - \$125,000.** Maintenance work and other general services projects of more than \$75,000, but less than or equal to \$125,000, including those involving on-call maintenance work or general services, may, except as otherwise provided in this chapter or the Act, be awarded by the City Manager, or his or her designee, pursuant to the non-public project informal bidding procedure.

(C) **More than \$125,000.** Maintenance work and other general services projects of more than \$125,000, including those involving on-call maintenance work or general services, shall, except as otherwise provided in this chapter, be awarded by the City Council pursuant to the non-public project formal bidding procedure.

(D) **City Engineer review of plans and specifications.** The City Engineer shall review and approve the working details, drawings, plans, and specifications prepared for every maintenance work and other general services project which may affect the design or operation of public improvements and which may bring into question the city's liability for dangerous conditions of public property.

(E) **Purchasing agent review of plans and specifications.** The purchasing agent, or his or her designee, shall review and approve the form of the working details, drawings, plans, and specifications prepared for every maintenance work and other general services project.

(F) **City Council review of plans and specifications.** The City Council shall review and approve the working details, drawings, plans, and specifications prepared for every maintenance work and other general services project approved by the City Council pursuant Section 3.08.060 (C) above.

(G) **Award.** Contracts for maintenance work and other general services projects of \$75,000 or less, including those involving on-call maintenance work or general services, if awarded, may be awarded in the best interests of the city. Contracts for maintenance work and other general services projects of more than \$75,000, if awarded, shall be awarded to the contractor who will best serve the interests of the city, taking into account, in addition to cost, their demonstrated competence, qualifications and suitability for the project in general.

(H) **Dollar limits and change orders or amendments.** Unless an exception provided

in § 3.08.140 below applies, any contract amendment or change order which would increase the contract amount above the amount provided for in Section 3.08.060 (C) above, plus 10% of the original contract amount, shall be approved by the City Council. For contracts awarded by the City Council, unless a lower or higher amount is stated in the City Council staff report for the project or directed by the City Council, the City Manager or his or her designees shall have authority to approve contract amendments or change orders up to the lesser of either \$125,000 or 10% of the original contract amount.

(I) **6-year term limitation.** No maintenance work or other general services contract shall extend for a period of more than 6 years, including any authorized extensions, unless specifically approved by City Council action.

(J) **No bid splitting.** The city shall not split a project, work, service, or purchase into smaller projects, works, services, or purchases for the purpose of avoiding any bidding or contracting requirements of this code.

(K) **Local preference; maintenance and general services.** As set forth in further detail in § 3.08.080(J) below, the City Council has made findings and adopted a local bidder preference program (“local program”) applicable to certain purchases of materials, supplies, and equipment, as well as contracts for maintenance work and other general services projects described in this section. Accordingly, contracts for maintenance work and other general services projects that are competitively bid and involve an expenditure of \$220,000 or less, shall be subject to the local program set forth in § 3.08.080(J). For recurring procurements/contracts, the local program shall be applicable only to the city’s first \$220,000 worth of such procurements/contracts for any fiscal year, as determined by city staff in its sole discretion. For such recurring procurements/contracts, the bidding documents shall indicate whether or not the local program is in effect for the applicable procurement. Properly certified local businesses (as defined in § 3.08.080(J)) shall be entitled to the specified reduction of 5% in the tabulation of their bid for purposes of determining the lowest responsible bidder, unless otherwise prohibited by law (such as special state or federal grant programs). If the local program is applicable to a bid offering, it shall be noted in the applicable bid solicitation.

3.08.070 Bidding requirements - professional services.

(A) **\$75,000 or less.** Professional services contracts of \$75,000 or less may be awarded by the director of the department responsible for the project, or his or her designee, by any alternative procedure.

(B) **\$75,001 - \$125,000.** Professional services contracts of more than \$75,000, but less than or equal to \$125,000 may, except as otherwise provided in this chapter or the Act, be awarded by the City Manager, or his or her designee, pursuant to the non-public project informal bidding procedure.

(C) **More than \$125,000.** Professional services contracts of more than \$125,000 shall, except as otherwise provided in this chapter, be awarded by the City Council pursuant to the non-

public project formal bidding procedure.

(D) **Purchasing agent review of scope of services.** The purchasing agent shall review and approve, or provide for the review and approval of, the scope of services prepared for every professional services contract.

(E) **City Council review of scope of services.** The City Council shall review and approve the scope of services prepared for every professional services contract approved by the City Council pursuant Section 3.08.070 (C) above.

(F) **Award.** Contracts for professional services shall be awarded to the contractor who will best serve the interests of the city, taking into account the demonstrated competence, professional qualifications, and suitability for the project in general. The city may consider cost of professional services if the authorized contracting party determines it to be a relevant factor under the circumstances.

(G) **Dollar limits and change orders or amendments.** Unless an exception provided in § 3.08.140 below applies, any contract amendment or change order which would increase the contract amount above the amount provided for in Section 3.08.070 (C) above, plus 10% of the original contract amount, shall be approved by the City Council. For contracts awarded by the City Council, unless a lower or higher amount is stated in the City Council staff report for the project or directed by the City Council, the City Manager or his or her designees shall have authority to approve contract amendments or change orders up to the lesser of either \$125,000 or 10% of the original contract amount.

(H) **No bid splitting.** The city shall not split a project, work, service, or purchase into smaller projects, works, services, or purchases for the purpose of avoiding any bidding or contracting requirements of this code.

3.08.080 Bidding requirements - materials, supplies, and equipment.

(A) **\$75,000 or less.** Purchases of materials, supplies, and equipment of \$75,000 or less may be awarded by the purchasing agent or the director of the department responsible for the purchase, or his or her designee, by any alternative procedure.

(B) **\$75,001 - \$125,000.** Purchases of materials, supplies, and equipment of more than \$75,000, but less than or equal to \$125,000 may, except as otherwise provided in this chapter or the Act, be awarded by the City Manager, or his or her designee, pursuant to the non-public project informal bidding procedure.

(C) **\$125,000 - \$220,000.** Purchases of materials, supplies, and equipment of more than \$75,000, but less than or equal to \$220,000 may, except as otherwise provided in this chapter or the Act, be awarded by the City Council pursuant to the non-public project informal bidding procedure.

(D) **More than \$220,000.** Purchases of materials, supplies, and equipment of more than \$220,000 shall, except as otherwise provided in this chapter, be awarded by the City Council pursuant to the non-public project formal bidding procedure.

(E) **Fleet replacement vehicles and equipment.** Notwithstanding anything to the contrary contained herein, purchases, in any amount, of vehicles or other equipment on the city's annual vehicle/equipment replacement list, as approved through the budget process each year, shall be awarded by the purchasing agent. Unless an exception provided in § 3.08.140 below applies or unless the purchasing agent uses the public agency alternative competitive bidding process provided in §3.08.125 below, the purchasing agent shall use the non-public project informal bidding procedure for purchases of more than \$75,000, but less than or equal to \$220,000, and the non-public project formal bidding procedure for purchases of more than \$220,000,

(F) **Department director review of specifications.** The director of the using department shall review and approve, or provide for the review and approval of, the specifications prepared for every purchase of materials, supplies, and equipment.

(G) **Purchasing agent review of specifications.** The purchasing agent, or his or her designee, shall review and approve the form of all contracts for the purchase of materials, supplies, and equipment.

(H) **City Council review of specifications.** The City Council shall review and approve the specifications prepared for every purchase of materials, supplies, and equipment approved by the City Council pursuant Sections 3.08.080 (C) and (D) above.

(I) **Award.** Contracts for the purchase of materials, supplies, and equipment of \$75,000 or less, if awarded, may be awarded in the best interests of the city. Contracts for the purchase of materials, supplies, and equipment of more than \$75,000, if awarded, shall be awarded to the lowest responsive and responsible bidder. If two or more bids are the same and the lowest, the authorized contracting party may accept the one it chooses.

(J) **Dollar limits and change orders or amendments.** Unless an exception provided in § 3.08.140 below applies, any contract amendment or change order which would increase the contract amount above the amount provided for in Section 3.08.080 (C) above, plus 10% of the original contract amount, shall be approved by the City Council. For contracts awarded by the City Council, unless a lower or higher amount is stated in the City Council staff report for the project or directed by the City Council, the City Manager, or his or her designees shall have authority to approve contract amendments or change orders up to the lesser of either \$125,000 or 10% of the original contract amount.

(K) **Local bidder preference program; purchases of materials, supplies, and equipment; maintenance and general services.**

(1) Based upon the findings provided for in the recitals of the ordinance adding this § 3.08.080(J), the City Council has determined that it is in the best interests of the city to give

a minimal preference to local businesses when the city is making certain purchases of materials, supplies, and equipment, as well as when it is entering into contracts for certain maintenance work and other general services projects, as set forth in this local bidder preference program (“local program”).

(2) The local program shall consist of the following general requirements, which shall be implemented by the purchasing agent within the city’s Purchasing Policies and Procedures Manual:

(a) A “local business” for purposes of this local program shall mean the vendor: (1) has fixed facilities with one or more employees, which may include a sole proprietor, located at an address within city limits (a post office box alone is insufficient); and (2) has an appropriate city business license/permit.

(b) A vendor seeking to qualify for this local program shall provide supporting information and certify in writing that it meets the above requirements as part of its bid.

(c) In applying the local program to bids on a city purchase subject to the local program, a qualifying local business shall be entitled to a reduction of 5% in the tabulation of its bid for purposes of determining the lowest responsible bidder, unless otherwise prohibited by law (i.e. special state or federal grant programs).

(d) The local program shall only be applicable to purchases of materials, supplies, and equipment which are competitively bid and which involve an expenditure of \$220,000 or less. If the local program is applicable to a bid offering, it shall be noted in the applicable bid solicitation.

(3) The local program preference described in division (J)(2) above shall be applicable only to purchases of materials, supplies, and equipment, as well as contracts for maintenance work and other general services, which are competitively bid and which involve an expenditure of \$220,000 or less. For recurring purchases, the local program shall be applicable only to the city’s first \$220,000 worth of such purchases for any fiscal year, as determined by city staff in its sole discretion. For such recurring purchases, the bidding documents shall indicate whether or not the local program is in effect for the applicable procurement. If the local program is applicable to a bid offering, it shall be noted in the applicable bid solicitation.

(4) The local program may also establish a preference for purchases of materials, supplies, and equipment, as well as contracts for maintenance work and other general services, which are competitively bid and which involve an expenditure of more than \$220,000. Such preference shall allow the city to take into consideration the net sales tax to be returned to the city as a result of an award to a qualifying local business in determining the lowest responsive and responsible bidder. The net sales tax shall be calculated based on the applicable bid price provided by the bidder in accordance with the city’s Purchasing Policies and Procedures Manual.

(L) **Recycled products preference.** In order to promote the use of products containing recycled material, including post consumer material and secondary material, the city may take into consideration the percentage of recycled product in the materials, supplies, or equipment being provided in determining the lowest responsive and responsible bidder. This section shall not be effective unless and until the purchasing agent adopts a written policy to implement its provisions, which policy shall be included in the city's Purchasing Policies and Procedures Manual. In addition, fitness and quality being equal, the city shall endeavor to purchase products containing recycled material instead of virgin products, whenever available at no more than the total cost of the virgin materials.

(M) **No bid splitting.** The city shall not split a project, work, service, or purchase into smaller projects, works, services, or purchases for the purpose of avoiding any bidding or contracting requirements of this code.

3.08.090 Public projects - formal bidding procedure.

(A) **Uses of formal bidding procedure.** This formal bidding procedure shall be used whenever formal bidding is required for a public project.

(B) **Required process.** The formal competitive bidding procedure shall comply with all aspects of state and local law governing formal competitive bidding including, but not limited to, the California Public Contract Code, California Government Code, California Labor Code, resolutions of the City Council as may be adopted from time to time, and the city's Purchasing Policies and Procedures Manual.

(C) **Notice inviting formal bids.** A notice inviting formal bids shall be provided. The notice inviting formal bids shall comply with § 22037 of the Act, as such section may be amended from time to time. Notices shall state the time and place for the receiving and opening of sealed bids and distinctly describe the project. The Purchasing Policies and Procedures Manual shall describe the minimum list of information required to be included in the notice inviting formal bids.

(D) **Published notice.** The notice shall be published within the time frame required by the Act (currently at least 14 calendar days before the date of opening the bids) in a newspaper of general circulation printed and published in the city, or, if there is no such newspaper, in a newspaper of general circulation which is circulated in the city.

(E) **Distribution of notice inviting formal bids.** The notice inviting formal bids shall also be sent to those construction trade journals specified in § 22036 of the Act in the manner and within the time frame required by the Act (currently at least 15 calendar days before the date of bid opening).

(F) **Additional notice.** The city may also provide any additional notice as it deems proper.

(G) **Contents of remaining bid and contract documents.** The contents and form of

the remaining bid and contract documents shall be approved by the director of the using department, as well as the City Attorney.

(H) **Bidder's security.** When required by applicable law or determined necessary by the purchasing agent or his or her designee, each bidder shall be required to provide appropriate security to guarantee its bid. Upon refusal or failure to execute the required contract or agreement and provide all required information and documentation, the full amount of the bid security shall be forfeited, except to the extent limited by applicable law.

(I) **City's authority.** The city may reject any or all bids received, and may waive any minor irregularities in each bid received.

(J) **No bids received.** If no bids are received, the authorized contracting party may award the contract by any alternative procedure.

(K) **Award of contract.** The contract shall be awarded in accordance with § 3.08.050(F). If two or more bids are the same and the lowest, the city may accept the one it chooses.

(L) **Rejection of bids.** The city may, in its sole and absolute discretion, reject any bids presented. If after the first invitation of bids all bids are rejected, after reevaluating its cost estimates for the project, the city shall have the option of any of the following:

- (1) Abandon the project;
- (2) Readvertise for bids in the manner described in this chapter; or
- (3) By passage of a resolution by a four-fifths vote of the City Council, declare that the project can be performed more economically by the employees of the city and have the project done by force account.

3.08.100 Public projects - informal bidding procedure.

(A) **Uses of public project informal bidding procedure.** This informal bidding procedure shall be used when a public project is involved and informal bidding is permitted by this chapter.

(B) **Contractor list.** The purchasing agent shall develop and maintain, or provide for the development and maintenance of, a list of qualified contractors, identified according to categories of work, as described in § 22034(a) of the Act. The list shall be developed and maintained in accordance with criteria established by the Commission. In developing the list, the purchasing agent or his or her designee shall obtain from the Contractor's State License Board and from the contractor's trade associations in the county, the names and addresses of qualified contractors located in the county.

(C) **Distribution of notice inviting informal bids.** The purchasing agent shall provide

a notice inviting informal bids. The notice inviting informal bids shall be mailed or otherwise distributed in the manner required by the Act. The notice inviting informal bids must be mailed or otherwise distributed within the time frame required by the Act (currently not less than 10 calendar days before the bids are due).

(D) **Contents of notice inviting informal bids.** The Purchasing Policies and Procedures Manual shall describe the minimum list of information required to be included in the notice inviting informal bids.

(E) **Proprietary projects or products.** If the director of the using department certifies that, to the best of his or her knowledge, the project, product, or service is proprietary in nature and can be obtained only from one contractor, and that no equivalent projects, products or services are available, the notice inviting informal bids may be sent exclusively to such contractor.

(F) **Contents of bid and contract documents.** The contents and form of the bid and contract documents shall be approved by the director of the using department, as well as the City Attorney; provided, however, that the City Attorney need not review or approve the contents of the technical specifications, drawings, and other technical documents.

(G) **Bidder's security.** When required by applicable law or determined necessary by the purchasing agent or his or her designee, each bidder shall be required to provide appropriate security to guarantee its bid. Upon refusal or failure to execute the required contract or agreement and provide all required information and documentation, the full amount of the bid security shall be forfeited, except to the extent limited by applicable law.

(H) **City's authority.** The city may reject any or all bids received, and may waive any minor irregularities in each bid received.

(I) **No bids received.** If no bids are received, the authorized contracting party may award the contract by any alternative procedure.

(J) **Award of contract.** The contract shall be awarded in accordance with § 3.08.050(F). If two or more bids are the same and the lowest, the city may accept the one it chooses.

3.08.110 Non-public projects - formal bidding procedure.

(A) **Uses of the non-public project formal bidding procedure.** A formal bidding procedure shall be used whenever formal bidding is required by this chapter and the project does not involve a public project.

(B) **Distribution of notice inviting formal bids or request for proposals.** A notice inviting formal bids or a request for proposals, as appropriate, shall be posted in the manner and within the timeframe provided for in the Purchasing Policies and Procedures Manual and provided directly to bidders, vendors, or contractors on the city's approved list for the type of purchase at issue. A notice inviting bids shall be used whenever the project or purchase must be awarded to

the lowest responsible and responsive bidder. A request for proposals may be used whenever the project or purchase is not required to be awarded to the lowest responsible and responsive bidder. If the purchasing agent and the director of the using department certify that, to the best of their knowledge, there is no local source or local provider available for the project, the notice inviting bids or the request for proposals, as appropriate, may be distributed to a list of qualified vendors maintained by the purchasing agent and/or published in a trade journal appropriate to the project.

(C) **Contents of notice inviting formal bids or request for proposals.** The Purchasing Policies and Procedures Manual shall describe the minimum list of information required to be included in the notice inviting formal bids or request for proposals.

(D) **Proprietary projects or sole source products.** If the director of the using department certifies that, to the best of his or her knowledge, the project, product, or service is proprietary in nature and can be obtained only from one vendor or contractor, and that no equivalent products or services are available, the notice inviting formal bids or request for proposals may be sent exclusively to such vendor or contractor.

(E) **Contents of remaining bid and contract documents.** The contents and form of the remaining bid and contract documents shall be approved by the director of the using department, as well as the City Attorney; provided, however, that the City Attorney need not review or approve the contents of the technical specifications, drawings, and other technical documents.

(F) **Bidder's security.** When required by applicable law or determined necessary by the purchasing agent or his or her designee, each bidder shall be required to provide appropriate security to guarantee its bid. Upon refusal or failure to execute the required contract or agreement and provide all required information and documentation, the full amount of the bid security shall be forfeited, except to the extent limited by applicable law.

(G) **City's authority.** The city may reject any or all bids or proposals received, and may waive any minor irregularities in each bid or proposal received.

(H) **No bids received.** If no bids are received, the authorized contracting party may award the contract by any alternative procedure.

(I) **Award of contract.** The contract shall be awarded in accordance with §§ 3.08.060(G), 3.08.070(F), or 3.08.080(H) as applicable. If two or more bids are the same and the lowest, the city may accept the one it chooses.

3.08.120 Non-public projects - informal bidding procedure.

(A) **Uses of non-public project informal bidding procedure.** This informal bidding procedure shall be used whenever informal bidding is allowed for a purchase which does not involve a public project.

(B) **Distribution of notice inviting informal bids or request for proposals.** A notice inviting informal bids or request for proposals, as appropriate, shall be provided. The notice inviting informal bids or requests for proposals shall be provided to the number of vendors or contractors provided for in the Purchasing Policies and Procedures Manual. A notice inviting bids shall be used whenever the project or purchase must be awarded to the lowest responsible and responsive bidder. A request for proposals may be used whenever the project or purchase is not required to be awarded to the lowest responsible and responsive bidder.

(C) **Contents of notice inviting informal bids or request for proposals.** The Purchasing Policies and Procedures Manual shall describe the minimum list of information required to be included in the notice inviting informal bids or request for proposals.

(D) **Proprietary projects or sole source products.** If the director of the using department certifies that, to the best of his or her knowledge, the project, product or service is proprietary in nature and can be obtained only from one vendor or contractor, and that no equivalent products or services are available, the notice inviting informal bids or request for proposals may be sent exclusively to such vendor or contractor.

(E) **Contents of remaining bid and contract documents.** The contents and form of the remaining bid and contract documents shall be approved by the director of the using department, as well as the City Attorney; provided, however, that the City Attorney need not review or approve the contents of the technical specifications, drawings, and other technical documents.

(F) **Bidder's security.** When required by applicable law or determined necessary by the purchasing agent or his or her designee, each bidder shall be required to provide appropriate security to guarantee its bid. Upon refusal or failure to execute the required contract or agreement and provide all required information and documentation, the full amount of the bid security shall be forfeited, except to the extent limited by applicable law.

(G) **City's authority.** The city may reject any or all bids or proposals received, and may waive any minor irregularities in each bid or proposal received.\

(H) **No bids or proposals received.** If no bids or proposals are received, the authorized contracting party may award the contract by any alternative purchasing procedure.

(I) **Award of contract.** The contract shall be awarded in accordance with §§ 3.08.060(G), 3.08.070(F), or 3.08.080(H) as applicable. If two or more bids are the same and the lowest, the city may accept the one it chooses.

3.08.125 Non-public projects - public agency alternative competitive bidding procedure.

In addition to the situations described in §§ 3.08.060 through 3.08.080, competitive bidding, either formal or informal, shall be deemed to have been satisfied in the situations provided for in this section. The purchasing agent shall establish rules and regulations within the Purchasing Policies

and Procedures Manual which are necessary to implement the provisions of this section.

(A) **Competitive bidding already completed.** When the purchasing agent and the authorized contracting party, with the approval of the City Manager, determines that:

(1) A competitive bid procedure has been conducted by another public agency including, but not limited to, another local agency, the state through the California Multiple Award Schedule (CMAS), the federal government through the General Services Administration (GSA), the U.S. Communities Government Purchasing Alliance, or the Western States Contracting Alliance (WSCA); and

(2) The price to the city is equal to or better than the price to that public agency.

3.08.130 Exceptions to competitive bidding - public projects.

In addition to the situations described in § 3.08.050, competitive bidding, either formal or informal, is not required for public projects in the situations provided for in this section. The purchasing agent shall establish rules and regulations within the Purchasing Policies and Procedures Manual which are necessary to implement the provisions of this section. Under the conditions outlined herein and in the Purchasing Policies and Procedures Manual, any alternative procedure may be used.

(A) **Emergencies.** In situations determined by the City Manager to constitute an emergency for a public project pursuant to § 22035 of the Act and Cal. Public Contract Code § 22050. The City Council hereby delegates to the City Manager the power to declare a public emergency and take any directly related and immediate action required by the emergency, up to a total of \$500,000, pursuant to § 22035 of the Act and Cal. Public Contract Code § 22050. Emergency expenditures of more than \$500,000 shall first be approved by the City Council. Work shall be performed without the benefit of competitive bidding, either formal or informal, only so long as necessary under those sections.

For projects of more than the amount provided for in Section 22032(a) of the Act (currently \$75,000), a report on the emergency and work performed shall be provided at the next regular meeting of the City Council, and then at every meeting thereafter required by § 22050. At such meetings, the City Council shall determine, by a four-fifths vote, that there is a need to continue the action without the benefit of informal or formal competitive bidding in accordance with § 22035 of the Act and Cal. Public Contract Code § 22050. The City Council shall terminate the emergency action at the earliest possible date that conditions warrant, so that the remainder of the emergency action may be completed pursuant to a formal bidding procedure.

For projects of less than the amount provided for in Section 22032(a) of the Act (currently \$75,000), the City Manager shall have the authority to cause the director of the department responsible for the project, or his or her designee, to proceed by any alternative procedure pursuant to § 3.08.050 above.

(B) **No competitive market.** When the City Council determines, upon

recommendation by the City Manager and purchasing agent, in accordance with applicable law, that a competitive market does not exist and that no competitive advantage will be gained by the public bidding process.

(C) **No bids received.** When no bids are received pursuant to either the public project informal bidding procedure or the public project formal bidding procedure.

(D) **Otherwise authorized.** Upon recommendation of the City Manager, purchasing agent and City Attorney, when otherwise authorized by this chapter or applicable law.

3.08.140 Exceptions to competitive bidding - non-public projects.

In addition to the situations described in §§ 3.08.060 through 3.08.080, competitive bidding, either formal or informal, is not required for non-public projects in the situations provided for in this section. The purchasing agent shall establish rules and regulations within the Purchasing Policies and Procedures Manual which are necessary to implement the provisions of this section. Under the conditions outlined herein and in the Purchasing Policies and Procedures Manual, any alternative procedure, including no bidding, may be used with the City Manager's approval.

(A) **Emergencies.** When the purchasing agent and the authorized contracting party, with the approval of the City Manager, determine that an emergency exists, as defined in § 3.08.010.

(B) **No competitive market.** When the purchasing agent and the authorized contracting party, with the approval of the City Manager, determines, in accordance with applicable law, that a competitive market does not exist and that no competitive advantage will be gained by the public bidding process.

(C) **State purchase.** When the purchase is made on behalf of the city by the State Department of General Services.

(D) **Purpose of bidding is otherwise accomplished.** When the purchasing agent and the authorized contracting party, with the approval of the City Manager, determine that it is in the best interest of the city and its administrative operations to dispense with public bidding for non-public projects under this chapter.

(E) **No bids received.** When no bids are received through the non-public project formal or informal bidding procedures.

(F) **Natural gas, water, and electricity.** The Utilities Director , or his or her designee, is authorized to negotiate and execute, on behalf of the city, agreements with privately owned, federally owned, state owned and locally owned entities for the wholesale purchase and sale of natural gas, water, economy energy, replacement energy, replacement capacity and transmission service to deliver such natural gas, water and energy to Corona or such other locations as may be appropriate without competitive bidding. The Purchasing Policies and Procedures Manual shall

include a process by which the Utilities Director shall approve such purchases and sales through utilization of the competitive open market for such commodities.

(G) **Library information purchases.** The Director is authorized to negotiate and execute, on behalf of the city, contracts for the purchase of library books, tapes, periodicals, and other information delivery formats (e.g. microfilm, DVD, CD-ROM, and internet information) without competitive bidding, so long as each purchase is in accordance with the budget approved by the City Council and there is an unencumbered appropriation in the fund account against which the purchase is to be charged. The Purchasing Policies and Procedures Manual shall include a process by which the Director approves such purchases in a manner which identifies a competitive price which is in the best interests of the city. The Director shall not be required to select the lowest price.

(H) **Mandated expenditures.** Expenditures mandated by law or regulation, such as county booking fees, waste disposal fees, or other non-negotiable permit, use, or application fees.

(I) **Otherwise authorized.** When otherwise authorized by this chapter or applicable law.

3.08.150 Surplus materials, supplies, and equipment.

(A) **Designations by city departments.** All city departments shall submit to the purchasing agent, at such times and in such form as he or she shall prescribe, reports showing all materials, supplies, and equipment which are deemed by that department to be surplus, in that they are no longer used or are unsuitable for city use by that department.

(B) **Transfer among departments.** The purchasing agent shall have the authority to transfer to another department any materials, supplies, and equipment designated by a department as surplus.

(C) **Sale, exchange, or trade.** The purchasing agent, or his or her designee, shall have authority to sell as surplus all materials, supplies, and equipment which cannot be used by any department or which have become unsuitable for city use, or to exchange the same for, or trade in the same on, new materials, supplies, and equipment. The sale of surplus materials, supplies, and equipment shall be made by public auction pursuant to applicable law and any rules and regulations provided for in the Purchasing Policies and Procedures Manual. In addition, the purchasing agent may approve the sale of any surplus materials, supplies, or equipment by means other than public auction, upon a finding that the sale in such alternative manner is in the best interests of the city and is supported by documentation sufficient to establish that the city is receiving compensation at least equal to the fair market value of the materials, supplies, or equipment. The City Council shall approve by resolution any sale, exchange, or trade of materials, supplies, and equipment with an estimated value of \$220,000 or more.

(D) **Abandonment or destruction.** Except as otherwise prohibited by applicable law, the City Manager shall have the authority, with the consent of the Finance Director, to authorize

the abandonment or destruction of materials, supplies, and equipment which have no commercial value or which will require an expenditure of funds for continued care, handling, maintenance, or storage which exceeds the estimated proceeds of sale. The authorization shall be in writing and shall be countersigned by the City Manager and Finance Director.

(E) **Donation.** Except as otherwise prohibited by applicable law, the City Council may, by resolution, establish a procedure for the City Manager and Finance Director to approve the donation of materials, supplies, and equipment which have no commercial value or which will require an expenditure of funds for continued care, handling, maintenance, or storage which exceeds the estimated proceeds of sale. Donations may be made to charitable, civic, or non-profit organizations, as well as other public agencies, and shall be done in a fair and equitable manner. In its resolution, the City Council shall establish rules and regulations to govern the fair and equitable donation of materials, supplies, and equipment. The resolution shall also indicate that the City Manager and Finance Director shall not approve any donation without first making a finding that the materials, supplies, and equipment are surplus to the needs of the city, that they either have no commercial value or will require an expenditure of funds for continued care, handling, maintenance, or storage which exceeds the estimated proceeds of sale, and that the donation is in the best interests of the city.

(F) **City officials and employees.** Surplus supplies and equipment may be sold to the public if so prescribed by the City Manager and/or the City Council. City officials and employees, and their immediate families, however, shall not be eligible to purchase such surplus items; provided, however, that retired service animals may be purchased by their primary handler.