



Department of
Administrative Services

Professional Development

Providing Training for
State Purchasing Professionals

Customer Focused, Performance Driven



Georgia Procurement Manual

January 2010 Revisions

Department of Administrative Services
State Purchasing Division

statepurchasing.doas.georgia.gov



Your instructor



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Webinar House Rules

- Webinar length- 1 hour and 30 minutes
- Questions - Hold until the end of the presentation





Webinar Objectives

The purpose of this webinar is to:



- Review new information added to the GPM
- Review changes to the GPM due to SPD rulings
- Outline additions made to the GPM
- Review changes to the GPM in order to streamline the procurement process



Accelerated Procurement Transformation

January 2010



Accelerated Transformation

Step 1: GPM and Systems Updates

To ensure access to up-to-date information and tools, the following updates take place:

Georgia Procurement Manual (GPM) Updates:

- Clarification to existing and new policy
- Clarification and addition of State Purchasing Division (SPD) directives
- Availability of additional resources and tools

To ensure that SPD maintains up-to-date information, the GPM will undergo revisions semiannually with the next round of updates scheduled for July 2010



Accelerated Transformation

Step 2: RFP Training and Assessment Tools

To ensure that Agency Purchasing Officers (APOs), College or University Purchasing Officers (CUPOs), and any other appropriate purchasing staff have a more detailed knowledge of the RFP process, SPD has added training courses to the current curriculum:

New Training Courses:



You can access information regarding SPD's training classes and webinars through the SPD Learning Management System



Georgia Procurement Manual

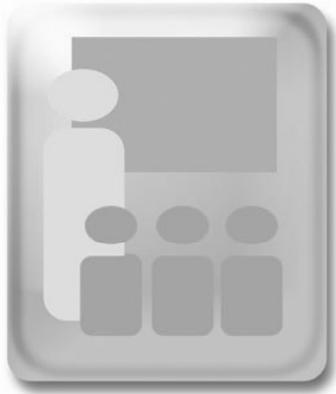
Revisions - January 2010



GPM Revisions

This webinar includes the following information regarding the ongoing maintenance of the Georgia Procurement Manual (GPM):

- Administrative Rulings
- Additional Responsibilities for the APO/CUPO
- New Information
- Additions to the GPM
- Forms and Processes



Georgia Procurement Manual

Administrative Rulings



Administrative Rulings

\$5000 Bid Threshold

The following is provided as a clarification of the \$5000 bid threshold.

Purchases totaling or exceeding \$5000.00 for a single fiscal year must be made through the competitive process unless an exception applies.

Purchases will be aggregated where reoccurring purchases are reasonably foreseeable

Each state entity is responsible for monitoring its purchases to ensure the state entity is not violating the rule by making multiple purchases of the same item/service, reasonably foreseeable and total \$5000 or more in any given fiscal year

SPD recommends monitoring the procurement information on a quarterly basis to assess and determine if a Open contract should be developed.



Example: Over \$5000.00 Threshold Purchase Order

The following scenario is provided to illustrate purchases have been made using Purchase Orders and exceeded the \$5000.00 bid threshold.

- A single purchase for lumber that includes \$4800 of pine and \$3000 of cedar which totals \$7800

The total of this purchase is greater than \$5,000 so the purchase will be competitively bid



Example: Over \$5000.00 Threshold Purchase Orders-Multiple Suppliers

The following scenario is provided to illustrate purchases made from different suppliers but for similar items.

- A single purchase for \$4800 of pine lumber has been made to ABC Lumber Co
- A single purchase for \$3000 of cedar siding has been made to XYZ Boards to Go

These purchases are for similar items but from different suppliers. Since the combined purchases are greater than \$5,000 the purchase must be competitively bid



Example: Over \$5000.00 Threshold Purchase Orders-Multiple Departments-Multiple Suppliers

The following scenario is provided to illustrate purchases made from different Departments from the same State Entity to multiple suppliers but for similar items.

- A single purchase for \$4300 of pine lumber has been made to ABC Lumber Co by the Facilities Department
- A single purchase for \$1500 of cedar siding has been made to XYZ Boards to Go by the Drama Department

These purchases are for similar items made by multiple Departments within the State Entity but from different suppliers. Since the combined purchases are greater than \$5,000 the purchase must be competitively bid



Example: Over \$5000.00 Threshold Purchase Order and P-Card transaction

The following scenario is provided to illustrate purchases made using the combination of Purchase Order and P-Card transaction which has exceeded the \$5000.00 bid threshold.

- A recent purchase order for lumber totaled \$4000 and a p-card transaction for lumber totaled \$4900 within the fiscal year

The APO/CUPO realizes the total purchases to date for lumber equals \$8900 for the fiscal year

A competitive bid should take place if any other lumber purchases are needed and an entity contract should be put into place.

Since the purchases have already occurred, the APO/CUPO should document the file with the issue, plan of action and communications delivered to affected staff, and corrective actions taken.

When the APO/CUPO assesses that lumber purchases is \$5,000 or more and also has knowledge that other purchases may be needed, a solicitation should be executed so an entity contract can be put into place for lumber needs for the remainder of the fiscal year.



Example: Under \$5000.00 Threshold

The following scenario is provided to illustrate purchases using the Purchase Order method which is below the \$5000.00 bid threshold.

- A single purchase for lumber that includes \$2300 of pine and \$1800 of cedar which totals \$4100 within a fiscal year

The total of the purchase is less than \$5,000 so the purchase does not have to be competitively bid



Georgia Procurement Manual

APO/CUPO Responsibilities

APO/CUPO Responsibilities

Chapter 2 – Authorities and Duties of Procurement Officials

The following includes additional responsibilities of the APO/CUPO contained in the following section within Chapter 2, Section 2.3.

Section 2.3 - Revised Designated Procurement Officer

Analyze state entity's current and forecasted purchases for any and all divisions/departments of the state entity on at least a quarterly basis

Monitor state entity's compliance with the administrative rule
Identify and document corrective action plans to resolve any areas of non-compliance

APO/CUPO must notify SPD of staff changes by submitting form
SPD-OP010, Entity Organizational Information

APO/CUPO Responsibilities

Chapter 2 – Authorities and Duties of Procurement Officials

To assist you with these additional responsibilities, SPD has created the following documents:

7 Stage Open Contract

7 Stages for Open Entity Contracts

The APO/CUPO identifies a need for an Open State Entity Contract through analysis of purchases. The need for an Open State Entity Contract is justified by the following:

- 1) the need cannot be met through a statewide contract, an existing entity contract, or a mandatory source;
- 2) the need exceeds (or is expected to exceed) the \$5000.00 threshold within a given fiscal year and must be competitively bid; and
- 3) the exact quantities or total number of orders are not known.

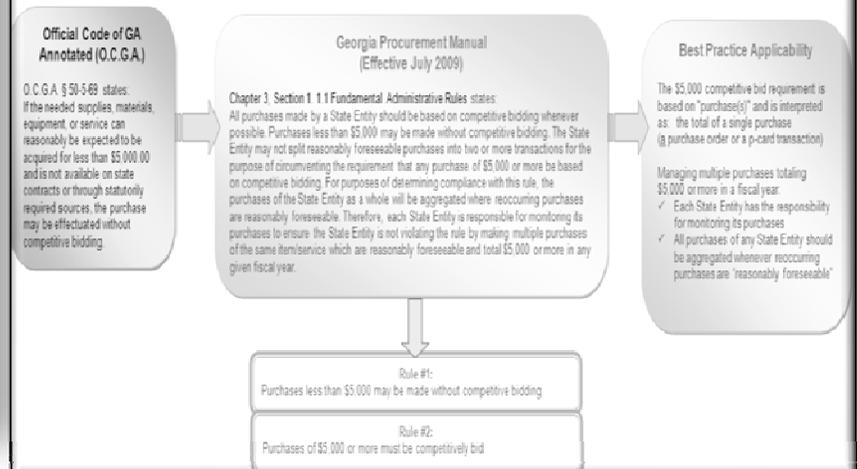
The following describes the action steps for the APO/CUPO for creating an Open State Entity Contract according to 7-Stage Process:

1. Purchasing Stage 1-Needs Identification

- 1.1. Through purchase analysis (through PeopleSoft and WORKS), the APO/CUPO determines that an Open State Entity Contract is needed as described above.

\$5000 Bid Document

Guidance for Compliance of \$5,000 Bidding Requirements & Managing Purchases



To obtain a copy of these documents:

1. Access the State Purchasing Division website.
2. Click on Process & Performance (On the top, left side of the screen).
3. Scroll to the Compliance section and locate the appropriate document.

APO/CUPO Responsibilities

Document: 7 Stage Open Contract

The 7 Stage Open Contract document was created to provide guidance for applying the seven stages for:

- Creating, Bidding and, Awarding of Open Entity Contracts

7 Stages for Open Entity Contracts

The APO/CUPO identifies a need for an Open State Entity Contract through analysis of purchases. The need for an Open State Entity Contract is justified by the following:

- 1) the need cannot be met through a statewide contract, an existing entity contract, or a mandatory source;
- 2) the need exceeds (or is expected to exceed) the \$5000.00 threshold within a given fiscal year and must be competitively bid; and
- 3) the exact quantities or total number of orders are not known.

The following describes the action steps for the APO/CUPO for creating an Open State Entity Contract according to 7-Stage Process:

1. Purchasing Stage 1-Needs Identification

- 1.1. Through purchase analysis (through PeopleSoft and WORKS), the APO/CUPO determines that an Open State Entity Contract is needed as described above.
- 1.2. The APO/CUPO's analysis of previous and anticipated future purchases should assist the APO/CUPO in identifying associated stakeholders and the benefits associated with a state entity contract (e.g. savings associated with aggregated spend). The APO/CUPO should review purchases and future needs of all of the State Entity's divisions/business units.

2. Purchasing Stage 2-Pre-Solicitation

- 2.1. APO/CUPO assembles a sourcing team, which consists of existing stakeholders (i.e. end users, project facilitator, etc.). APO/CUPO facilitates meetings by the sourcing team to prepare for the solicitation preparation stage:
 - review existing solicitations, contracts, etc. to identify suppliers with whom the state entity has conducted business and also analyze the market to identify additional sources of supply, market dynamics, and industry standards (i.e. minimal warranty terms, etc.)

Discussion: Analysis of the market and sources of supply provides critical information to the sourcing team, including understanding how items may typically be bundled or sold, which will assist the source team in organizing the solicitation. For example, if all suppliers provide all of the needed items, then the sourcing team may consider making a single award. However, if the market analysis reveals there are suppliers that provide some but not all items, then the needed items may be

APO/CUPO Responsibilities

Document: 7 Stage Open Contract

The following information is an example of the tasks necessary for each stage. For detailed information, please review the 7 Stage Open Contract document.

- ***Stage 1-Needs Identification***

APO/CUPO determines an Open State Entity Contract is needed

- ***Stage 2-Pre-Solicitation***

APO/CUPO assembles a sourcing team, which consists of existing stakeholders (i.e. end users, project facilitator, etc.)

- ***Stage 3-Solicitation Preparation***

APO/CUPO to fully develop the solicitation

Non Team Georgia Marketplace™ Users: eQuote or RFP

For Team Georgia Marketplace™ Users: RFQ or RFP

APO/CUPO Responsibilities

Document: 7 Stage Open Contract

The following information is an example of the tasks necessary for each stage. For detailed information, review the 7 Stage Open Contract document.

- ***Stage 4-Solicitation Process***

Post solicitation in accordance with the GPM administrative rule

- ***Stage 5-Evaluation Process***

Solicitation is awarded to the lowest priced, responsive and responsible bidder or if method of procurement used is RFP, then the highest scored responsive, responsible Offeror

- ***Stage 6-Award Process***

Public notice of the results of the solicitation must be provided in accordance with the GPM

- ***Stage 7-Contract Process***

Contract is maintained in accordance with the GPM. Posted to the Agency Contract Index on GPR or in Team Georgia Marketplace™ as appropriate

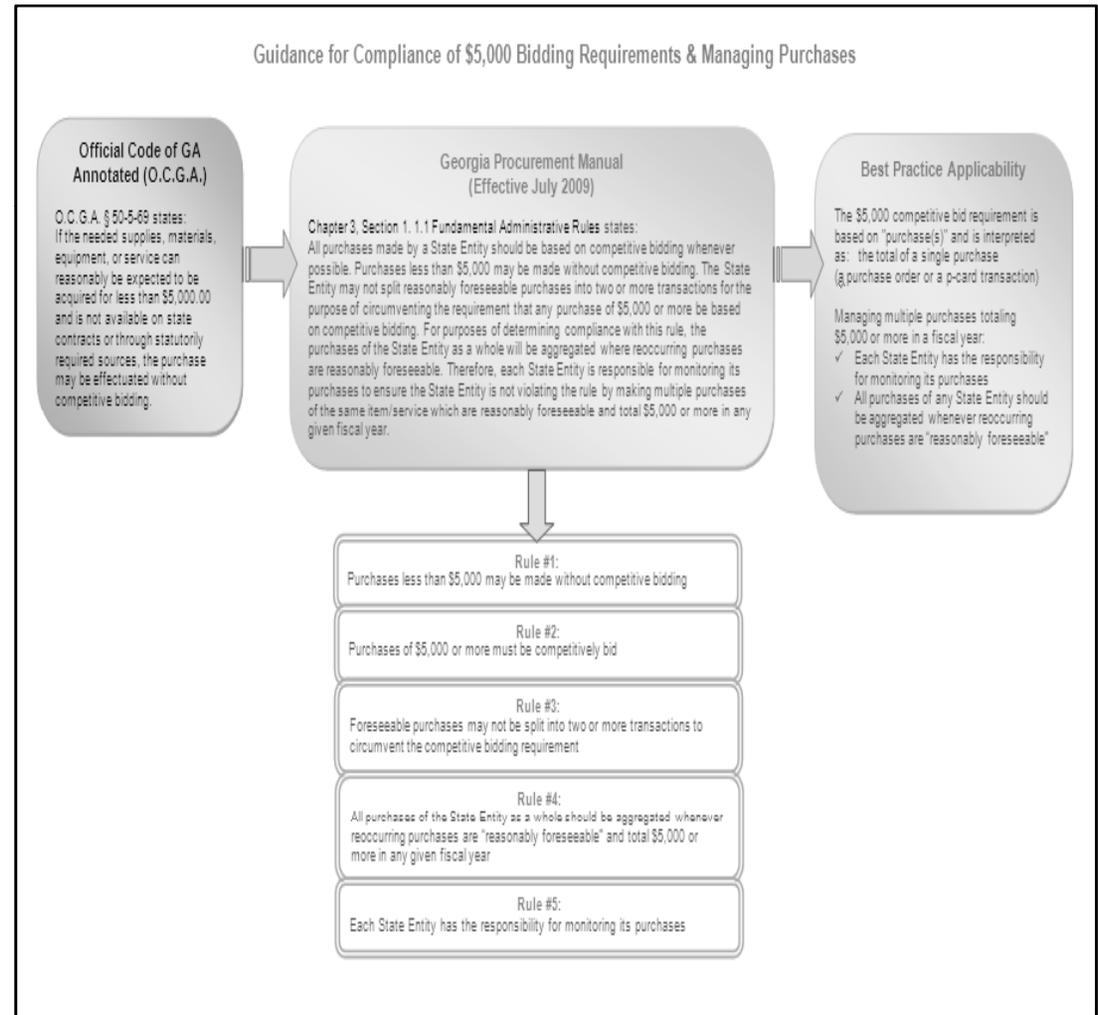
APO/CUPO Responsibilities

Document: \$5000 Bid Document

The \$5000 Bid Document was created to provide guidance for entities to comply with the \$5K bidding requirements and to manage their purchases.

The \$5,000 competitive bid requirement is based on "purchase(s)" and is interpreted as:

The total of a single purchase, (including any made by purchase order and/or p-card transaction)





Georgia Procurement Manual

New Information

New Information

Chapter 3 - eQuote

This update clarifies the priority of the eQuote process. eQuote is mandatory for all Request for Quotes (excluding any Request for Quotes conducted through the Team Georgia Marketplace™) unless the SPDAC grants an exception.

Section 5.5 - Revised eQuote Scope

Construction bids may now be conducted through eQuote

Section 5.5 - Revised eRFQ Advertisement Policy

Vendors electing to subscribe to receive automated email notifications are allowed to select one or more NIGP™ codes which best reflect the types of goods and/or services the vendors offer

Section 5.5 - Revised eQuote Vendor Notification Policy Chart

The eQuote Vendor Notification Policy Chart has been removed from the GPM

New Information

Chapter 3 – Pre Bid Conferences

Revision of acceptable time frames in which to conduct a Pre-Bid Conference. The change is as follows:

Section 5.6 - Revised

Item 4

The APO/CUPO may conduct a pre-bid conference within a reasonable time, but not less than five (5) business days before the Bid Closing Date/Time.

In the event a Pre-Bid date is less than the minimum of 5 business days, then the closing date must be extended to comply with this requirement.

If this situation is discovered *after* the solicitation is posted, then an Addendum must be issued to accommodate this requirement.

New Information

Chapter 3- Record Retention Policy

The retention of all procurement records is governed by the Georgia Open Records Act. These additions are as follows:

Section 9.3 - Revised

The APO/CUPO shall maintain procurement records in accordance with the state entity's approved retention schedule.

The APO/CUPO must manage the procurement records in a way that ensures documents are easily located to support contract management, respond to public request for documents and facilitate procurement processes such as resolution of protests and completion of audits.

For more information regarding State Retention Schedules:

1. Access the Secretary of State website: <http://www.sos.ga.gov/archives>
2. Click on Archives
3. Click on Records Management
4. Click on Retention Schedules

Example: Record Retention Policy

Below is an example of the information retrieved from the database.

[Georgia Archives](#) > [Who We Are](#) > [Records and Information Management Services](#) > [Retention Schedules](#) > [State Retention Schedule Search Page](#) > **Retention Schedule Keyword Results**

3 records found for purchase orders
Displaying page 1 of 1:

Record Title	Description	Retention	Legal Citation	Retention Classification	Archival Instructions	Number
Purchase Orders	Approvals for the purchase of supplies and equipment	5 years	O.C.G.A. 11-2-725	Temporary - Short Term		01-022
Equipment Records	Records relating to purchase orders, warranties, operation manuals and service contracts for all computer hardware and software	4 years after disposition of equipment	O.C.G.A. 9-3-32; 16-0-03	Temporary - Short Term		06-004
Equipment Maintenance Records	Includes purchase orders, warranties, operating manuals, service contracts and service logs for maintenance of agency-owned equipment and vehicles	5 years	O.C.G.A. 9-3-31; 9-3-32; 9-3-33	Temporary - Short Term	Vital Record - duplicate and store offsite	09-006

New Information

Chapter 3- Sole Brand

SPD has further defined the process of Sole Brand solicitation. These additions are as follows:

Section 6.10 - Revised

State Entities must attach the Sole Brand Justification form to all Sole Brand solicitations.

The APO/CUPO must complete and post form SPD-NI0003a, Sole Brand Justification. This form *must* be publicly posted with the solicitation.

New Information

Chapter 3- Notice of Award Amendment

The process of amending an existing Open contract has been further defined within the GPM. These additions are as follows:

Section 6.16- Revised

APO/CUPO must complete form SPD-CP024, Notice of Award Amendment prior to making any changes to an existing Open contract.

APO/CUPO must maintain a copy of this document for each amendment in the original contract file.

APO/CUPO must update the State Entity Contract Index or Team Georgia Marketplace™ as appropriate.

The APO/CUPO must review the contract to deem that renewals or changes to the contract are acceptable and provided for in the original solicitation



Georgia Procurement Manual

Additions to the GPM

Additions to the GPM

Chapter 3 – Piggyback Purchasing

In Section 6.5 further clarification is provided regarding the process of purchasing from another state entity contract. It is as follows:

Section 6.5 - Revised

A State Entity will be permitted to use another State Entity's contract only with the approval of the SPDAC by utilizing the Piggyback Request form, which is available online at the following link:
<http://www.doas.georgia.gov/StateLocal/SPD/Seven/Pages/Home.aspx>

State Entity must submit documentation, which includes:

- A copy of the complete contract, including Terms and Conditions, NOAA
- The issuing State Entity's written approval to "piggyback"
- Supplier's written approval to honor same price, terms and conditions
- Justification as to why the other State Entity's contract should be used.
- APO/CUPO must indicate if there will be repetitive purchases or whether it is a one-time buy

Additions to the GPM

Chapter 3 – Statewide Contract Waivers

Requests by State entities to go off contract for those Mandatory Stateside contracts may be granted by SPD. It is as follows:

Section 6.8 - Revised

Approvals will be limited to purchases with a specified time frame and/or dollar value.

APO/CUPO must prepare the Statewide Contract Waiver Request form and must be submitted via email to processimprovement@doas.ga.gov

SPD will respond in writing to the request within 5 business days.

In the event SPD grants the waiver, the waiver must be maintained as part of the State Entity's procurement file

Waivers to Statewide contracts do not relieve the State Entities of any bidding requirements

Additions to the GPM

Chapter 3 – P-Card Policy

The revision of section 6.12 provides for the reference to and inclusion of an online link to the P-Card Policy. It is as follows:

Section 6.12 - Revised P-Card Policy

Use of the P-Card is governed by the State of Georgia P-Card Policy

To view this policy:

1. Access the State Purchasing website.
2. Click on Purchasing Card Program on the right side of the screen.
3. Locate the P-Card Policy.

<http://www.doas.georgia.gov/StateLocal/SPD/Services/Pages/SpdCards.aspx>

Additions to the GPM

Chapter 3 – Insurance Limits

The addition of section 6.3 provides for the reference and inclusion of an online link to the Insurance and Bonding Guidelines. It is as follows:

Section 6.3 - Revised

Use of the Insurance and Bonding Guidelines is a resource to assist in developing insurance and bonding requirements. The guidelines are available online at :

<http://www.doas.georgia.gov/StateLocal/SPD/Seven/Pages/Home.aspx>

SPD strongly recommends adherence to these guidelines. However, with the exception of certain requirements, which have been identified in the guidelines as being required by law, each State Entity is authorized to determine its own insurance and bonding requirements after fully assessing the State Entity's exposure

Additions to the GPM

Chapter 3 – Fuel Card Policy-Coming Soon

In section 6.17 additional references have been added to this section regarding the Fuel Card Policy. They are as follows:

Section 6.17 - Revised Fuel Card Policy

The Department of Administrative Services, through its Fleet Management Division, has issued Statewide Fuel Card Standards & Guidelines in accordance with State Policy, which govern the use of the State's fuel card

To view this policy:

1. Access the State Purchasing website.
2. Click on Statewide Card Programs on the right side of the screen.
3. Locate the Fuel Card Policy.

<http://www.doas.georgia.gov/StateLocal/SPD/Services/Pages/SpdCards.aspx>

Additions to the GPM

Chapter 3 – Team Georgia Marketplace™

SPD provides Team Georgia Marketplace™ to serve as an online tool to support various state purchasing functions such as:

- Registration of bidders and suppliers
- Advertisement of contract opportunities
- Electronic bidding
- Contracts management

A table has been added to Chapter 3, Section 5.4 to serve as a guide for using Team Georgia Marketplace™ for the specific transaction types.

Additions to the GPM

Chapter 3 – Team Georgia Marketplace

A table has been added to the GPM to serve as a guide for using Team Georgia Marketplace™ for the specific transaction types

eProcurement	
IF	THEN
Paper requisition is currently required	ePro Requisition Required
Request requires approval	ePro Requisition Required
Requesting anything in Team Georgia Marketplace™ Catalog (All Statewide Contract items)	ePro Requisition Required
Change Order for existing Purchase Order	ePro Requisition Required
Paid w/ Recurring Voucher (i.e. rent, utilities, etc.)	No ePro Requisition Required
Change Order for existing Contract	Optional, follow State Entity guidelines
Point of Sale P-Card Purchases	Optional, follow State Entity guidelines
Strategic Sourcing	
IF	THEN
State Entity is live with Team Georgia Marketplace™	All Sourcing Events (RFQs, RFPs, and RFIs) are required to be electronically sourced using Strategic Sourcing. The resulting award must be made via a Purchase Order or a Contract.
PCard	
IF	THEN
Purchasing from Statewide Contracts	PCard should be used as payment method
Purchasing from State Entity Contracts	PCard should be used as payment method
Purchasing exempt items	PCard should be used as payment method
Point of Sale	PCard should be used for payment method, follow State PCard Policy
Supplier Contracts	
IF	THEN
State Entity is live with Team Georgia Marketplace™	Contract required to be entered in lieu of the State Entity (Agency) Contract Index by either creating new contracts or amending existing contracts which are one year or longer with subsequent renewals

Additions to the GPM

Chapter 9 – Protest Process

Directives have been added to the Protest Process. The change is as follows:

Section 1 - Revised

This section describes the mandatory administrative procedure whereby vendors may challenge the solicitation process and whereby bidders/offeror's may challenge contract awards.

This section has been added to alert the Supplier community that the protest procedures are mandatory and must be followed in the order prescribed.



Georgia Procurement Manual

Forms and Processes

Forms and Processes

Many forms and processes have been added to the GPM to further streamline the purchasing process. The list is as follows.

Form Number	Form Name	Timeline for Approval
SPD-NI0004	Sole Source Notice of Intent to Award	N/A
SPD-NI0005	Emergency Justification Form	N/A
SPD-NI0008	SWC Waiver Request Form	5 business days
SPD-NI0009	Piggyback Request Form	5 business days
SPD-SP014	Sales and Use Tax Registration Form	3 business days
SPD-OP010	Entity Organizational Information	N/A

To access these forms:

1. Access the State Purchasing Division website.
2. Click on 7 Stages of Procurement on the top, left side of the screen.
3. Scroll down to the appropriate stage to locate the form.

Forms and Processes

SPD-NI0004 Sole Source Notice of Intent to Award

In order to streamline the procurement process for Sole Source purchases, an additional field for Sole Brand information has been added. The following areas must be completed and attached to the electronic solicitation to be posted on the GPR.

- Enter Request Information
- Enter Request Details

- If Sole Brand also applies to the Sole Source, enter information in the Commodities section

eMail to:
processimprovement@doas.ga.gov

Sole Source Intent to Award Justification

Request Information	
Date of Request: _____	
Entity Information	
Entity Name: _____	
Entity Code (5-Digit Code): _____	
Procurement Officer (APO / CUPO): _____	
APO / CUPO eMail Address: _____	Phone Number: _____
Request Submitted By	
Name: _____	
Title: _____	
eMail Address: _____	
Phone: _____	
Request Details	
Sole Source – A purchasing situation in which a procurement is only available from one source. The announcement must be posted to the GPR for a minimum of five (5) business days.	
Identify efforts made to locate other possible sources. _____	
Supplier / Source Name: _____	
Supplier / Source Contact: _____	
Phone Number: _____	
Scope of Work	
Provide a detailed description of commodities or services to be provided. _____	
For Commodities, Complete the Following:	
Provide an explanation why only a particular style, model, type or manufacturer is required (i.e. why the commodity is the only commodity which will meet the state _____	
Letter from Original Equipment Manufacturer (required):	
<input type="checkbox"/> Attached	
Exclusive Capability	
Provide a detailed description of proposed source's unique capabilities and/or personnel to perform the work and why this is the only source. _____	
Note	
State entities' DPA for Sole Sources is "unlimited" unless otherwise directed by the State Purchasing Division Assistant Commissioner (SPDAC).	

Forms and Processes

SPD-NI0005 Emergency Justification

When remedying an emergency event, you will need to submit the completed Emergency Justification form and any required documents to SPD, Process Improvements within 1 business day.

- Enable Macros
- Enter Organization and APO/CUPO information
- Enter purchase details

eMail to:
processimprovement@doas.ga.gov

The screenshot shows a web browser window displaying the Georgia Emergency Justification form. At the top, a security warning states "Security Warning Macros have been disabled." with an "Options..." button. The form is titled "Emergency Justification" and includes the following sections:

- Organizational Information:** Fields for State Entity Name, Date, and State Entity Code (5-Digit Code).
- APO/CUPO Information:** Fields for Name and e-Mail Address.
- Emergency Purchase Details:** Fields for Item(s) Purchased, Total Amount of Purchase, and Indicate Method of Purchase (with checkboxes for P-Card Transaction and PO Number, and sub-fields for Date, Cardholder Name, and Explanation of Emergency).
- Submission Details:** Instructions on how to submit the form online and via email, including the email address processimprovement@doas.ga.gov.

Forms and Processes

SPD-NI0008 Statewide Contract Waiver Request

There may be times where a mandatory Statewide Contract may not meet the state entity's requirements. If this happens, submit the completed form to SPD requesting a waiver to go off contract. When a Statewide Contract waiver is granted, it is intended for a one time purchase unless otherwise noted.

- Enter Organization and APO/CUPO information
- Enter mandatory Statewide Contract Information
- Enter Justification details

eMail to:
processimprovement@doas.ga.gov


 Georgia
 Statewide Contract Waiver Request
 Form will not be accepted unless submitted by APO/CUPO

Organizational Information	
State Entity Name: _____	Date: _____ (mm-dd-yy)
State Entity Code (5-Digit Code): _____	
APO/CUPO Information	
Name: _____	
e-Mail Address: _____	
Telephone: _____	
Statewide Contract Information	
Contract Name: _____	
Contract Number: _____	
Justification Details	
Describe in detail the goods or services being procured: _____	
State reason the existing SWC does not meet your needs: _____	
Request is for: <input type="checkbox"/> One Time Waiver <input type="checkbox"/> Repetitive Purchase	Estimated Waiver Time Frame: _____
Estimated Quantity: _____	Estimated Amount: _____
State Purchasing Division (SPD) Review Decision	
Select Category Group Manager: _____	
Approved <input type="checkbox"/>	Approval Date: _____ (mm-dd-yy)
Approval Period (time frame): _____	
Approved Amount (not to exceed): _____	
Additional Comments: _____	
Not Approved <input type="checkbox"/>	Approval Date: _____ (mm-dd-yy)
Additional Comments: _____	
Assistant Commissioner/Director: Approved <input type="checkbox"/> Not Approved <input type="checkbox"/>	Date Approved: _____ (mm-dd-yy)
Submission Details	

Forms and Processes

SPD-NI0009 Piggyback Request Form

Piggyback purchasing allows the issuing State Entity and the awarded vendor to agree to open up the contract for the use of other State Entities. However, the State Entity seeking to Piggyback on another Entity's contract must submit the Piggyback Request form.

- Enter Organization and APO/CUPO information
- Enter Issuing Entity's Contract Information
- Enter and attach required documentation
- Enter Justification details

eMail to:
processimprovement@doas.ga.gov

Georgia
 Piggyback Request

Form will not be accepted unless submitted by APO/CUPO

Organizational Information	
State Entity Name: _____	Date: _____ <small>(mm-dd-yy)</small>
State Entity Code (S-Unit Code): _____	
APO/CUPO Information	
Name: _____	
e-Mail Address: _____	
Telephone: _____	
Issuing State Entity Contract Information	
State Entity Name: _____	
Contract Name: _____	
Contract Number: _____	
Contract Expiration Date: _____	
Required Documentation Submitted with Request	
Copy of State Entity Contract	<input type="checkbox"/> Attached
Issuing State Entity Approval to Piggyback	<input type="checkbox"/> Attached
Contract Vendor's Approval to Piggyback	<input type="checkbox"/> Attached
Amount of Current Spend by Issuing Entity Against the Contract: _____	
Justification Details	
Describe in detail the goods or services being purchased: _____	
Explain why the State Entity Contract should be used: _____	
Total Estimated Amount: _____	
Request is for: (Select One)	<input type="checkbox"/> One time buy <input type="checkbox"/> Repetitive purchases
If repetitive purchases are needed, detail estimated time frame for request: _____	
SPDAC Review Decision	
Approved <input type="checkbox"/>	Approval Date: _____ <small>(mm-dd-yy)</small>
Approval Period (time frame): _____	
Approved Amount (not to exceed): _____	
<small>Note: If the approved amount is exceeded by the entity, a new request will be required to be submitted. The APO/CUPO must submit a monthly report of purchases against this contract and the dollar amount to ProcessImprovement@doas.ga.gov.</small>	

Created 12-07-09

SPD-NI009

Forms and Processes

SPD-SP014 Sales and Use Tax Registration

For awards at or exceeding \$100k, it is statutorily directed that State Entities require the Apparent Successful Vendor to submit the completed Sales and Use Tax form. This form must be submitted to the Georgia Department of Revenue (GDOR) by the Issuing Officer to determine if the supplier is a taxpayer in good standing. Written authorization *must* be received from GDOR *prior* to formally awarding the solicitation.

eMail to:
tsd-state-contractors@dor.ga.gov

This form and process is required
for each and every renewal



SALES AND USE TAX REGISTRATION

The purpose of this form is to obtain information regarding the vendor to determine whether the vendor may be considered a prohibited source as defined by O.C.G.A. Section 50-5-82. The information provided in this form will be submitted to the Georgia Department of Revenue.

Please complete the following information:

- Vendor's Name:
- Physical Location Address:
- Federal Identification Number (FEI):
- Have you ever been registered in the State of Georgia?
- If so, please provide the following information, if applicable:
 - State Taxpayer Identification Number (STI):
 - Sales and Use Tax Number:
 - Withholding Tax Number:
- What type of service will you perform?
- Will you sell any tangible personal property or goods?



Procedures-eQuote /Team Georgia Marketplace™ Bond and Insurance Requirements

SPD previously directed the usage of eQuote for construction bids which by statute require bid bonds for construction in excess of \$100k. The following procedures are to be implemented to address this requirement.

- Identify in the eQuote/Team Georgia Marketplace™ solicitation the need for bonds

Suggested wording:

"Bidders must scan and attach a copy of the required Bid Bond. Upon evaluation, the apparent awarded supplier will be contacted via email to submit the *original* bond. Award of this eQuote is contingent upon receipt of this document. Failure to provide the original bond document will negate the award."

Suggested wording:

"Failure to provide copies of the required bond document will exclude the submitted bid response from the evaluation process."



Procedures-eQuote Awards

Bond and Insurance Requirements

At the close of the solicitation and subsequent evaluation of the bid response, the following steps are to apply.

- State Entity evaluates the response

No formal award (executed contract/posted award document) can be made until original bond is received by the State Entity at a specified date and time

- Entity must contact the bidder in writing that the intended awarded supplier is to submit the original bond by a specified date and time

- Original Bond is rec'd by the State Entity, then the award can proceed if solicitation value is under \$100k.

If award exceeds \$100k, award is finalized upon receipt of the written authorization from GDOR

Reminder:

When using an electronic means to solicit your bids, paper responses of the bid are *not* permitted.

Forms and Processes

SPD-OP010 Entity Organizational Information

When a change in personnel occurs within the Entity's Procurement Department it is necessary that the APO/CUPO submits certain information to SPD regarding this change. This includes new hires, promotions, transfers or separations within the procurement department.

ENTITY ORGANIZATIONAL INFORMATION

ENTER ENTITY NAME

- Enter Organization and APO/CUPO information
- Enter individual's contact information
- Submit to SPD

APO/CUPO's Manager	Name	Title	Telephone Number	Email Address
Procurement Staff (reports to APO/CUPO)				

eMail to:
processimprovement@doas.ga.gov

Documentation Procedures: Team Georgia Marketplace™

The table below is provided to document the procedures for forms reviewed in the previous slides. This guide is to assist all State Entities, including those users of Team Georgia Marketplace™ with the necessary procedures.

Non Team Georgia Marketplace	Team Georgia Marketplace™
<p>Sole Brand Justification Form</p> <ol style="list-style-type: none"> 1. Attach and post with the solicitation 2. File electronic or paper form with solicitation 	<p>Sole Brand Justification Form</p> <ol style="list-style-type: none"> 1. Attach and post with the solicitation 2. SPD recommends including to the title of the solicitation “Sole Brand”
<p>Piggyback Request Form-SPD Authorized</p> <ol style="list-style-type: none"> 1. Attach with the PO and contract 2. File electronic or paper form with PO 	<p>Piggyback Request Form-SPD Authorized</p> <ol style="list-style-type: none"> 1. Create a new contract 2. Reference of the original contract 3. New contract must include a copy of piggybacked contract 4. Form is posted with the PO and the PO is referenced in the contract.

Documentation Procedures: Team Georgia Marketplace™

The table below is provided to document the procedures for forms reviewed in the previous slides. This guide is to assist all State Entities, including those users of Team Georgia Marketplace™ with the necessary procedures.

Non Team Georgia Marketplace	Team Georgia Marketplace™
<p>SWC Waiver Request Form-SPD Authorized</p> <ol style="list-style-type: none"> 1. Attach with the PO 2. File electronic or paper form with PO 	<p>SWC Waiver Request Form-SPD Authorized</p> <ol style="list-style-type: none"> 1. Post form with the PO or with the event if competitively bid 2. Include a comment indicating a SWC waiver 3. Include waiver approval date as part of the comment
<p>Emergency Justification Form</p> <ol style="list-style-type: none"> 1. Attach with the PO 2. File electronic or paper form with PO 	<p>Emergency Justification Form</p> <ol style="list-style-type: none"> 1. Post with the PO. 2. Include a comment indicating an emergency purchase

Upcoming Revisions

As SPD continues to streamline processes and clarify the administrative rule, you can expect to see more revisions. Some of these may include the following:

Upcoming Revisions

- Updated Forms
- Clarification to existing rules
- Continued streamlining of procurement processes

State Entities may submit recommendations to changes to the GPM through their APOs/CUPOs. *ONLY* APOs/CUPOs can submit recommendations to SPD:
processimprovement@doas.ga.gov

Title your email subject line *GPM Changes*



Webinar Summary



**New
Information to
the GPM**



SPD Rulings



**Additional
Resources**



Corrections



**Streamlining
of
Procurement
Processes**



**Upcoming
Revisions**



Questions?

