



Winston-Salem

Financial Management Services
City/County Purchasing

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Memorandum

TO: Lisa Saunders, Chief Financial Officer
FROM: Jerry Bates, City/County Purchasing Director
DATE: December 13, 2019
SUBJECT: Purchasing Policy and Procedures Manual
CC: Steve Wuthrich

The City of Winston-Salem Purchasing Policy and Procedures Manual Revision March 31, 2017, has been updated with several revisions including but not limited to procedures for the Request for Proposals, Request for Qualifications, and the Uniform Guidance Procurement Policy.

A summary of revisions to the City of Winston-Salem Purchasing Policy and Procedure Manual December 31, 2019 follows:

1. The previous policy had an outdated link to the Ethics Policy on the City Employee Intranet at the very end of Section 1.3 – General Information. The revision revised the link to point to the location of the Ethics Policy on the new public City website.
2. The revision added to 2.1 Competitive Bidding Methods III. Procedure a summary section on Request for Qualifications.
3. The revision added a 2.4.1.1 Emergency Declaration Procedure.
4. The previous policy procedures for 2.5 Request for Proposals were outdated due to the City Council Directive in January 2018 for the selection of a vendor for services. The revision updates those procedures to current practice.
5. The previous policy procedures for 2.6 Professional Services were outdated due to the City Council Directive in January 2018 for the selection of a vendor for services. The revision updates those procedures to current practice.
6. The previous policy in 2.7 Minority/Women’s Business Enterprises (M/WBE) Requirements III. Procedure listed \$300,000 as the amount that subcontracting goals are to be established. The revision reduces that amount to \$100,000 per the City Council Directive in January 2018.
7. The previous policy chart (2.11.1) of authorization approvals required City Manager approval for purchases less than \$20,000. The revision modified that chart of authorization approvals to reflect the changed administrative procedure that purchase requests and change orders under \$20,000 require ACM approval and no longer require City Manager approval.

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8. The previous policy chart of authorization approvals in 2.11.1 was moved to Section 3 – Purchasing Procedures – 3.6. The chart identifies authorization for purchase orders and change orders.

9. The revision added the following statement as a note below the chart of authorization approvals 3.6: “Note that in the absence of the City Manager, the designated City Manager has authority to award and authorize contracts, declare surplus, and process all related purchasing documents as the acting City Manager.”

10. The revision added the following statement to the Procedures of 4.2 Purchasing Card Policy – Purchasing Cards may not be used for: “Meal purchases during trips (cash advance is to be requested prior to the trip or reimbursement of expense is to be requested following the trip)”

11. The revision added a section provided from the City Attorney 4.5 Uniform Guidance Procurement Policy. This gives direction when spending federal grant and loan award funds. In addition a note was placed directly below 2.1 Competitive Bidding Methods to alert readers of that added section: “*Exception to Policy – When spending federal grant and loans funds see 4.5 Uniform Guidance Procurement Policy”

12. The previous policy 5.5 When Do I Need A Contract? states: “Contracts are mandatory for services and all construction/repairs made on City property greater than \$500.” The revision was corrected from greater than \$500 to all. A reference to exceptions was added as well to state: “Contracts are mandatory for services and all construction/repairs made on City property. Exceptions must be approved by the City Attorney.”

13. The previous policy 5.10 Contract Policy stated: “Contracts are mandatory for services and construction or repair work greater than \$500.” The revision removes a reference to construction/repair and changes it to “greater than \$1,000” to reflect the current use of Purchase Cards rather than a Purchase Order contract for purchases up to \$1,000. This provides direction for services not provided on City property. A reference to exceptions was added as well to state: “Contracts/Agreements are mandatory for services over \$1,000. Exceptions must be approved by the City Attorney.”

14. The revision added language to 5.10 Contract Policy that the Contract Approval Checklist is required when routing contracts. Also a note was added regarding the exception to the typical requirements for contractors to start work due to an Emergency Declaration.