



OEWD - Bidding Guidelines San Francisco Nonprofit Sustainability Initiative

Computer Equipment or Software

- OEWD requires that each organization submit an "Equipment & Information Technology Systems Request Form" for all computer equipment or software purchases, detailing what the items are and how it is programmatically necessary.
 - Additionally, if the cumulative cost will total **between \$1,000 and \$9,999** for any single purchase from a given vendor (any purchases made within a single month from a given vendor), the organization must obtain at least 3 quotes from different sources. The quotes must be for the same exact equipment that is being included on the request form (same make, model, etc.). Once obtained, submit the 3 quotes with the Request Form to the grant administrator. If the organization is unable to obtain 3 quotes, they must provide an explanation that must be accepted by the grant administrator prior to purchase.
 - Once the Request Form has been approved, the organization may submit the Expense Report and accompanying invoices/proofs of purchase.
 - Please provide the serial number, date purchased, cost, make and model of any computer equipment.
- If amount of purchase is between **\$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above as well as the additional procedures below.
 - Record the names, phone numbers and prices quoted from each business that submits a quote.
 - Compare quotes and make a selection. Document your selection process. If you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
 - Make a Good Faith Effort to include minority and women-owned businesses (directions below).
 - If applicable, follow the Drafting a Contractual Agreement Instructions (directions below).
 - Provide documentation of the above to Community Vision for final approval.

Furniture

- OEWD requires that each organization submit an "Equipment & Information Technology Systems Request Form" for all furniture purchases, detailing what the items are and how it is programmatically necessary.
 - Additionally, if the cumulative cost will total **between \$1,000 and \$9,999** for any single purchase from a given vendor (any purchases made within a single month from a given vendor), the organization must obtain at least 3 quotes from different sources for each purchase. The quotes must be for furniture as similar as possible to the furniture included on the Request Form. If the organization is unable to obtain three quotes, they must provide an explanation. Once obtained, submit the 3 quotes with the Request Form to the grant administrator.
 - Once the Request Form has been approved, the organization may submit the Expense Report and accompanying invoices/proofs of purchase.
- If amount of purchase is **between \$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above and follow the additional procedures below:
 - Record the names, phone numbers and prices quoted from each business that submits a quote

- Compare quotes and make a selection. Document your selection process. If you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
- Make a Good Faith Effort to include minority and women-owned businesses. (Directions below)
- If applicable, follow the Drafting a Contractual Agreement Instructions (below)
- Provide documentation of the above to Community Vision for final approval

Amount of any purchase is \$100,000 or more – FORMAL BIDDING REQUIRED

- Prior approval of Community Vision is required. Please contact grant coordinator early in the process to ensure that bidding requirements of all departments are coordinated.

GOOD FAITH EFFORT INSTRUCTIONS

Outreach to minority and women-owned businesses Good faith efforts shall be made by Grantee Corporation to utilize women and/or minority-owned business enterprises for sources of supplies and professional services. Community Vision has a good faith effort tracking template. When spending \$29,000.00 or more, provide these businesses with written technical requirements of your needs and request them to submit a quote. Also, eliminate unnecessary requirements or other barriers that prevent these businesses from competing, (for example: don't require unreasonably high liability insurance for small projects.)

DRAFTING A CONTRACTUAL AGREEMENT INSTRUCTIONS

When working with a subcontractor, always use a written contract. At minimum, the agreement must include the following items:

1. General Information: the names of both contracting parties (your agency and the subcontractor), the scope of the service to be provided, the time and place of the service, the method of payment, the monitoring and reporting method to verify their work, signatures of both contracting parties, and compensation. Under "compensation," be specific: either stipulate the total dollar amount that you will pay for the service, or, if paying hourly, stipulate the maximum dollar amount that the subcontractor cannot exceed.
2. Required Subcontracting Provisions: Attach the Required Subcontracting Provisions to the contract. These provisions include all necessary federal and local regulations and can be found on the program website.
3. Approval Clause: Include this wording in the contract: "This contract is subject to written approval by Oversight Office." If you have questions, contact your Grant Coordinator

Equipment & Information Technology Systems Request Form

1. Date:	2. Organization:
3. Organization Address:	4. Contact Name:
5. Contact Email Address:	6. Contact Phone:
7. Condition:	
<input type="checkbox"/> Replace existing hardware <input type="checkbox"/> Upgrade existing hardware <input type="checkbox"/> New <input type="checkbox"/> Lease	
8. Category – Check all that apply:	
<input type="checkbox"/> Desktop Computer <input type="checkbox"/> Laptop <input type="checkbox"/> Copier <input type="checkbox"/> Copier <input type="checkbox"/> Scanner <input type="checkbox"/> Fax <input type="checkbox"/> Phone <input type="checkbox"/> Tablet <input type="checkbox"/> <input type="checkbox"/> Television Projector <input type="checkbox"/> <input type="checkbox"/> Infrastructure (server, wiring, etc.) <input type="checkbox"/> Software <input type="checkbox"/> Capital Improvement Furniture (items ≤ \$1,000 per unit) Licenses <input type="checkbox"/> Other	
9. Description of Equipment: (item, make, model, and quantity)	
10. Total Projected Cost: (breakdown cost to item, per unit cost, total cost, funding source, % of funding source)	
11. Description of how equipment will be used:	

For Approval by		
OEWD		
Date	Name	Signature



Professional Services

- If the cumulative cost of professional services will total **between \$1,000 and \$9,999** for any single contract with a given contractor, Community Vision requires the following:
 - At least 3 quotes from different sources
 - Each organization must submit their quotes to the grant administrator along with an explanation of the selection process. This includes (1) a record of the businesses (name, phone number, and price quoted) they contacted in their search for a contractor to perform the needed services and (2) a written description of why the final contractor was selected, if you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
 - This documentation must be approved by the grant administrator prior to contract signing.
 - Once the documentation has been approved and the contract has been signed, provide Community Vision with a copy of the contract
- If the cumulative cost of professional services will total **between \$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above as well as the additional procedures below.
 - Make a Good Faith Effort to include minority and women-owned businesses (directions below).
 - Follow the Drafting a Contractual Agreement Instructions (directions below).
 - Provide documentation of the above to Community Vision for final approval.
 - Once the documentation has been approved and the contract has been signed, provide Community Vision with a copy of the contract
 - For professional services contracts over \$50,000, the city's First Source Hiring requirements apply

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