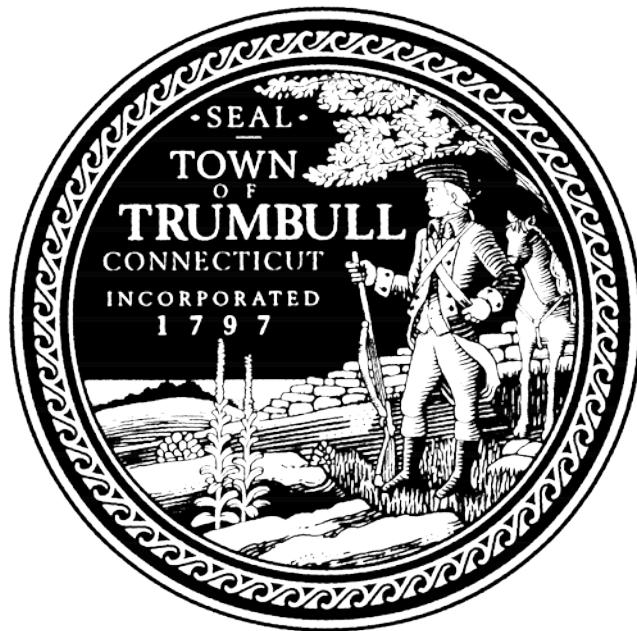


**PURCHASING POLICIES AND PROCEDURES
OF THE
TOWN OF TRUMBULL**



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**TOWN OF TRUMBULL
PURCHASING POLICY AND PROCEDURES**

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CHAPTER 1. GENERAL POLICY AND MISSION

The mission of the Town of Trumbull Purchasing Department is to provide unparalleled service to the residents of the Trumbull community by procuring the highest quality and most suitable material, equipment and services, for use by Town departments while considering such factors as quality, delivery, lowest overall cost, and liability. These Procurement Policies and Procedures are governed by the Town's Charter, which became effective on December 1, 2020 (*Chapter III, Section 6(G)*) and incorporate the concept of open competitive bidding. Under this system, purchase awards are made to responsible and responsive suppliers that meet the Town's specifications, requirements, objectives, and conditions, and have the capacity to perform and deliver the specified material, equipment or services in a timely manner.

CHAPTER 2. AUTHORITY FOR PROCUREMENT

The Director of Finance serves as the Purchasing Authority for the Town, directs the purchasing program through its Purchasing Department and has responsibility to purchase and oversee the materials, equipment, supplies and services necessary for the proper and efficient operation of the Town and its departments.

The Purchasing Department and the Town's designated procurement personnel, under the direction of the Purchasing Authority, are authorized to act as its agent and their foremost obligation is to comply with this procurement policy and function with integrity. It is a principle of this Town that all suppliers are treated on a fair and equitable basis. The Town's Municipal Code and Code of Ethics is the employees' and Town Officials' guide to ethical behavior in the workplace. It is incorporated herein and in total by reference.

All Town departments shall assist the Purchasing Department function in carrying out the Policies and Procedures contained herein by adhering to these Policies and Procedures. All revisions to the Town's Purchasing Policies and Procedures shall be formally issued by the Purchasing Authority and adopted by the Town Council.

There is a difference between policy and procedures within the context of this document, as defined below:

Policy

A *policy* is the written governing principle and guideline that is required by Town Charter and that defines general limits, direction and authority of the procurement function. All individuals involved in any way, be it advisory or functional, with the procurement process are expected to adhere to the policies and guidelines to assure compliance with all local and state statutes.

Procedures/Practices

Procedures/Practices are a series of related tasks that make up the sequence or the established way of performing the work and functions of procurement activities. Practices and procedures should incorporate or reference the Town's policies and standards as well as those imposed by State of Connecticut law and statutes.

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CHAPTER 3. THE ETHICS OF PROCUREMENT

Section 1. General

The Town Charter and Code of Ethics define the standards of ethical behavior for all Town employees and members of Boards and Commissions relating to all procurement activities. (See *Town of Trumbull Charter* - Effective date – December 1, 2020; *Code of Ethics of the Town of Trumbull* - Effective November 22, 1989, and as the same may be amended from time to time)

Section 2. Conflict of Interest

When conducting business, the Town expects its employees and members of Boards and Commissions to treat every supplier on a fair and equitable basis and to use their good judgment at all times in the course of activities related to the procurement of goods and services for Town use.

No purchase shall be made from nor shall services (other than services as a Town official (as defined in Chapter I, section 4 of the Town Charter), agent, or employee of the town) be secured from any Town official or employee of the town, or from any entity of which such Town official or employee or immediate family member, as defined in the Code of Ethics, is a partner or officer, or holds a substantial interest, unless such relationship and the fact that such purchase is contemplated shall be made known in writing to the agency making such purchase, and notice thereof posted, for at least five business days before such purchase be made, in the Legal Notices section of the town website and on the bulletin board in the Town Clerk's office.

If in doubt about any particular situation, an individual should review the details with his/her supervisor; or consult with the Town's Ethics Commission.

Section 3. Unfair Buying

It is unethical to make awards on the grounds of favoritism, habit buying or excluding suppliers from competition based upon unsubstantiated opinions. Furthermore, employees or members of Boards and Commissions lacking the authority to purchase shall not represent that they have such authority.

Section 4. Supplier Relations

Four (4) general principles should be observed by employees and Town Officials in all procurement related transactions:

- Fairness
- Integrity
- Responsiveness
- Courtesy

It is the Town's practice to grant an interview to any supplier's representative at a mutually convenient time.

Section 5. Endorsement

It shall be the Town's policy not to officially endorse a supplier or its products to other potential customers of the supplier. Mere listing of the Town as a customer without promotional language is not an endorsement.

Section 6. Samples

The Town or its representatives shall not accept samples on a "gratis" basis except when required for evaluation. When goods valued over \$100 are delivered for evaluation or field trial, an evaluation

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contract or purchase order at no charge must be issued to the supplier to document the matter.

Section 7. *Procurement of Goods or Services for Personal Use*

Under no circumstances shall any employee purchase materials, goods or services from a supplier for personal use by giving the impression that the sale is for the Town. If a supplier makes a general practice of providing discounts to Town employees, then the Town employee may accept these discounts on their personal purchases. However, the sale must not name the Town as the purchaser.

Section 8. *Gifts and Hospitality*

Town employees and members of Boards and Commissions may not accept, solicit, or give the appearance even indirectly of accepting loans, substantial gifts, hospitality or any other item of value or service of monetary value from any entity with which the Town does business, or is likely to do business, provided that this shall not apply to situations in which the entity's business is not related to the employee, board or commission member's responsibilities.

Gifts or hospitality the value of which is less than \$100 shall not be subject to this rule.

Section 9. *Violations*

No employee or members of Boards and Commissions shall be excused from complying with the Purchasing Policies and Procedures, Town Code of Ethics, general principles of procurement ethics, or any of the specific rules or standards contained in this Purchasing Policy. Employees should understand that violation may subject an employee to disciplinary action including, without limitation, termination of employment. Violations by members of Boards and Commissions are covered under the rules governing the Town's Ethics Commission.

Any person or department who violates any requirement of these Purchasing Policies shall be required to appear before the Board of Finance to explain the reason for such violation.

Section 10. *Freedom of Information Act (FOIA)*

The Town of Trumbull follows the State of Connecticut's Freedom of Information Act requirements. A complete copy of the Freedom of Information Act is available on the State website www.state.ct.us/foi.

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**CHAPTER 4. THRESHOLDS FOR GENERAL PURCHASING
AND COMPETITIVE BIDDING**

Competitive bidding can take place only when there is more than one qualified supplier and when there is time to accomplish the process without jeopardizing the needs of the end user department.

The following thresholds shall apply with regard to general procurement and competitive bidding:

Anticipated Expenditure	Action
\$0 to \$999.99	The department-authorized personnel must approve the order form, which can then be forwarded to the Purchasing Department for a direct purchase from the vendor. No purchase requisition is required.
\$1,000 - \$4,999.99	<p>Written purchase quotations shall be solicited from at least two (2) vendors or service providers or obtained from current website or price sheets. A purchase requisition is required. In the event department-authorized personnel are unable to secure two oral/written quotes then the department-authorized person shall make an earnest effort to determine best value and initiate purchase.</p> <p>If unable to procure two written purchase quotations, department-authorized personnel should make a record of the vendor names and dates contacted and the last price paid for a similar product or service, which should be approved by the Purchasing Agent.</p> <p>The department-authorized personnel shall take into account supplier response, availability, product quality, and price in determining best value.</p> <p>The refusal to quote from an otherwise valid supplier shall qualify as a quotation and the process shall be documented in writing by the department.</p>
\$5,000 - \$24,999.99	Written purchase quotations or Request for Proposal quotations shall be solicited from at least three (3) vendors or service providers or obtained from current websites or price sheets. The refusal to quote from an otherwise valid supplier shall qualify as a quotation. The process shall be documented in writing by the department.
\$25,000 or more	Purchasing Department issues a Formal Published Solicitation requesting a Sealed Bid or Proposal.

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CHAPTER 5. COMPETITIVE BIDDING

Section 1. General

The Town's procurement decisions as required and whenever possible and practical, and as established by the Town charter, are to be made using a competitive bidding process. Competitive bidding for a product or service requires the allocation of sufficient time to conduct the bid process. Competitive bidding also assumes the availability of more than one qualified supplier for a specified and required good or service and is open to goods and or services that are functionally equivalent to that specified in a request for proposal/quote.

Section 2. Definitions and Procedures

Section 2.1. Bid

The offer of a qualified (supplier) bidder to provide specific goods and/or services in accordance with all specifications and conditions indicated in a solicitation.

Section 2.2. Bidder

A respondent to either a Request for Bid, Qualification or Proposal.

Section 2.3. Bidder Qualification Statement

For highly complex and technical or service-oriented high dollar projects, the Purchasing Department may require from all responders to a bid or proposal request a "***Bidders Qualification Statement***" (Attached).

Section 2.4. Cooperative Bid or Proposal

A request for Bid or Proposal process with one or more than one municipality represented. One of the represented municipalities acts as the lead municipality and coordinates the bidding process on behalf of all other municipal participants. The Purchasing Authority shall approve all Cooperative Bid/Proposal/Qualification scenarios.

Section 2.5. Emergency

Emergency, as used in these policies and procedures, is defined as "needs to be done to prevent further loss, public health or need, and/or someone in danger."

Section 2.6. Legal Notice

Advertisement of a Request for Bid, Proposal, or Qualification. All formal bid requests shall be advertised by a legal notice in a local newspaper having a substantial circulation in the Town, at least ten (10) business days prior to the opening of said bids. Additionally, notification of a bid request shall be included on the official Town of Trumbull website www.trumbull-ct.gov and may be published on the State of Connecticut Department of Administrative Services (DAS) website and/or any other publication as deemed appropriate by the Purchasing Department or End User Department.

Section 2.7. Request for Bid or Qualifications (RFP or RFQ)

A competitive solicitation (unsealed or sealed) of prices for specific goods and/or services based on specifications established by or for the Town. Resulting bids are final and nonnegotiable. Requests for Competitive Qualifications (RFQ) are issued when the marketplace consists of a number of qualified suppliers, the specifications are clear and generally require no special support or services.

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In certain instances, such as low-value, repetitively purchased items, end user departments may solicit pricing information for budgetary and requisition information; however, end user departments shall not solicit quotations, bids, or proposals for high-dollar, major procurements without the direct consent of the Purchasing Department or Authority. All correspondence with suppliers concerning purchases or prospective purchases shall be submitted to the Purchasing Department.

The Town of Trumbull reserves the right to reject any and all quotes or bids deemed not to be in the best interests of the Town and to waive any defects or informalities in a bid or proposal.

Section 2.8. Request for Proposal (RFP)

A competitive solicitation for sealed proposals from qualified suppliers to accomplish a specified scope of work or to supply specific goods, services, methodologies and/or solutions to highly technical or service-oriented projects. Negotiations may be conducted after evaluation of offers. RFPs are utilized when there are limited qualified suppliers, the specifications are complex, exact designs or specifications are not available, and only generic requirements or objectives exist. RFPs are used for special or extended services, and for all professional services, including consulting.

The main component of an RFP consists of the Town's terms and conditions, a description of the scope of work, proposal requirements, any special conditions, service requirements, insurance requirements and contract format.

With RFPs, price may not be the primary consideration. The ability of the proposer to deliver successfully the stated outcome of the Scope of Work required and provide the specific service component are most important, with price being of equal importance. It is not necessarily the lowest price proposal that will be given the award, for low price without the proposer being able to provide the required deliverables is meaningless. It is the proposer who provides the best overall value and the stated outcome and service at a price that can be accommodated by the Town that will be given the award.

Negotiations may occur with RFPs.

The Town of Trumbull reserves the right to reject any and all quotes or bids deemed not to be in the best interests of the Town and to waive any defects or informalities in a bid or proposal.

The department making the recommendation for award resulting from an RFP shall forward a memorandum to the Purchasing Department stating the justification for award. Additionally, any and all contracts resulting from an RFP award shall be forwarded to the Town Attorney for review.

Section 2.9. Request for Qualifications (RFQ) or Information (RFI)

When complex specifications or unusual services are required, it may be appropriate to issue a Request for Qualifications (RFQ) or Request for Information (RFI) or to determine which suppliers can meet a requirement. These requests should clearly describe the general requirements and request suppliers to offer proof of their capabilities, or examples of their products and/or services that could meet the requirements, and experiences in similar situations. Responses to an RFQ or RFI may also facilitate the development of specifications and a potential list of suppliers for a formal RFP/Q or, in the case of professional services, may result in the selection of a supplier or consultant.

An RFQ response may include pricing information. If pricing information is requested, it shall be requested under separate sealed cover to allow a more objective evaluation of responders' qualifications. In some

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instances, the requested pricing may be Rough Order of Magnitude (ROM) pricing to be used for budgetary purposes only. ROM pricing does not in any way obligate either the Town or the supplier.

Section 2.10. Responsible Bidder or Offeror

A supplier or person who has the capability and capacity in all respects to meet, fully satisfy and perform the contractual requirements and specifications of the bid request and has the business integrity and reliability that will assure good faith performance.

Section 2.11. Responsive Bidder or Offeror

A supplier or individual who has submitted a bid or proposal response to an RFQ or RFP that conforms in all material respects to that specified in the solicitation (specifications).

Section 2.12. Specifications - Data Supplied by End User Department

The competitive bidding process requires that the desired product or service is sufficiently defined so that equal opportunity is provided to all suppliers interested in bidding. The End User Department requiring the product or service shall supply all necessary data to the Purchasing Department to be used in the preparation of, and for inclusion in, a Request for Bid/Proposal document. This data shall include but not be limited to:

- Detailed specifications, brand or model (or Town-approved 'equal to'), statement of work, terms and conditions, drawings, material lists, inspection requirements and other pertinent data.
- Generic requirements or descriptions of the performance objectives in sufficient detail (*when exact specifications do not exist*).
- Service objectives, desired deliverables and acceptance criteria (*for services*).
- All requirements dealing with support, warranty, training, etc.
- Required delivery or completion information.
- Recommended bidders (*if known*) - suppliers the end user department believes are qualified to provide the products or services.

Upon completion of the aforementioned information, the End User Department shall submit to the Purchasing Authority a "***Request for Formal Bid/Quotation, Proposal, Information or Qualifications***" (**Attached**) along with the above-mentioned *Data Supplied by End User Department*. Prior to the Purchasing Department issuing a formal request, this formal request shall be signed by the department-authorized personnel or Board/Commission Chairman and the Finance Director.

Section 2.13. Professional Services

Professional services are technical or unique functions or consulting services performed by independent contractors or consultants whose occupation is the rendering of such services within the purview of their profession. "Profession" includes the performance of any type of personal service to the public that requires as a condition precedent to the performance of the service the obtaining of a license or admission to practice or other legal authorization or licensing from a board or commission. Examples of some professional services include, but are not limited to: Architects, Engineers, Accountants, Actuaries, etc. Professional service providers will be selected within their disciplines. Normally, professional service firms will be contracted for projects that are planned in advance, but they may also be engaged when emergencies arise from time to time. These firms, although similarly credentialed, will be selected project by project based on capacity, experience, or ability to respond when time-sensitive needs arise. The selection of vendors for legal services, which is the subject of Chapter III, Section 8, of the Town Charter, is not subject to these Purchasing Policies.

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Section 2.14. On-Call Services

On-Call services are those resources that are necessary to respond to the day-to-day needs of the town. These are typically trades such as carpenters, plumbers and electricians. The Purchasing Department will advertise for desired services to establish a list of prequalified companies. If on-call services are not expected to exceed \$25,000, since these services are prequalified and vetted, multiple written price quotations or proposals are not required. If on-call services are expected to exceed \$25,000, multiple written price quotations or proposals are required.

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CHAPTER 6. THE COMPETITIVE BID/PROPOSAL PROCESS

Section 1. Preparation of Requests for Qualification/Proposals/Bid/Information

It is the sole responsibility of the Purchasing Department to formally issue all Town Requests for Qualification/Proposals/Bid, Information and Qualifications and any addenda thereto and it is the sole responsibility of the Purchasing Department to control and oversee all aspects of the bid/proposal process from bid/proposal development to opening and award.

All requests to change, alter, clarify, or redefine the specifications, requirements, statements and scope of work, or terms and conditions of a bid/proposal request shall not be discussed or communicated to potential bidders other than through the Purchasing Department during the bid/proposal process. Should a Town employee, department-authorized personnel or board or commission member bypass the Purchasing Department by communicating information to bidders during the bid/proposal process that may result in an unfair competitive advantage for potential bidders, or in differing/conflicting information, the Purchasing Department may cancel (and reissue) a bid/proposal if it is deemed to be in the best interests of the Town and integrity of the competitive bid/proposal process.

If a supplier has questions regarding any aspect of a bid/proposal request and the Town clarifies such information, that information must be shared with all of the competing suppliers. As necessary, all significant changes to a specification may result in the issuance of formal addenda to the original RFQ/RFP/RFI. Those addenda shall be provided to all competing suppliers by the Purchasing Department and if required, an extension of the due date shall be formally made by the Purchasing Department to all competing suppliers.

All formal bidding requests require a minimum of ten (10) business days from public announcement (Legal Notice) to response due date for a formal bid submission. Additional time shall be and should be given if the procurement is of complex nature and requires extensive evaluation. Any extension of a Bid/Proposal due date shall be solely approved and issued by the Purchasing Department.

A firm that provides pre-bid services for any project shall be precluded from participating in the formal bidding process for that project.

Section 2. Telephone and Email Submissions

Any telephone and/or emailed submission of a bid or proposal is strictly prohibited and ONLY a physical bid/proposal response to a sealed bid/proposal request shall be accepted or considered.

Section 3. Pre-Bid Meeting

When the complexity of the requirements of an RFQ/RFP/RFI so warrant, a meeting on Town premises with suppliers and Town personnel prior to the bid opening shall be conducted. The objectives of such a meeting are to provide a clear understanding of an RFQ/RFP/RFI statement of work, specifications and requirements and to provide close coordination of the Town's specifications and requirements and the supplier's ability to meet them. Usually, the meeting is held after potential bidders have had time to review the bid/proposal request or general announcement (i.e., large public building projects). In most instances, these meetings are not mandatory and attendance is not a prerequisite to submitting a formal bid. In some instances, when specifications and requirements are uniquely complex and critical, a pre-bid meeting is mandatory. Should a supplier not attend a "mandatory" Pre-Bid meeting, that supplier's bid/proposal shall not be accepted.

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The Purchasing Department shall maintain a record of all Pre-Bid Meeting attendees.

Section 4. Bid Deposit (Certified Check or Bid Bond)

Under circumstances as determined by the Purchasing Department, a Bid Bond in the form of a certified check or surety bond acceptable to the Town may be required. The amount required is specified in the bid invitation as a percentage of the proposed bid and set by the Purchasing Department. Should the successful bidder fail to enter into a contract or to accept a purchase order, the Bid Deposit will be forfeited to the Town. If the bidder has provided a Bid Bond and fails to enter into a contract or to accept a purchase order the Bond will be called. Bid Deposits are returned to the unsuccessful bidders within ten (10) days after the execution of a contract or purchase order between a successful bidder and the Town. Bid Deposits are returned to the successful bidders upon completion of a mutually agreed contract and/or issuance of a purchase order.

Section 5. Payment and Performance Bond

Under circumstances as determined by the Purchasing Department and, in some instances, State of Connecticut statute, a Payment and/or Performance Bond may be required from a successful bidder. Notification of this requirement shall be stated in the formal bid/proposal request. The Town holds Payment and/or Performance Bonds until all contract obligations are satisfactorily met. The Payment and/or Performance Bond will be forfeited to the Town should the successful bidder fail to comply with the terms and conditions set forth in the specifications and the award. Payment and/or Performance Bonds are to be made payable to the Town of Trumbull.

Section 6. Other Bid Request Components

Other components that may be included in a bid request may be, but not be limited to the following:

- Insurance requirements
- Contract format
- Scope of services required
- Organization and staffing information
- Schedule information
- Supplier history
- Key personnel resumes
- Executive summary (firm history, similar projects, organizational chart, etc.)
- Claims, disputes, litigation
- References

Section 7. Bid/Proposal Addenda

In those instances where it is deemed that an addendum to an already advertised bid is required, it is the sole responsibility of the Purchasing Department to issue said addendum in a format that assures maximum communication to potential responders. As stated in all formal bid requests, it is the sole responsibility of a bidder to verify any addenda that may have been issued relating to an RFP or RFQ. Any notice of addendum shall be published on the Town website. Failure to submit a response that does not address any changes or addenda may result in a disqualification of a proposal submission.

Section 8. Bid/Proposal Opening – Due Date and Time

Formal bid/proposal openings, at which received bid/proposals shall be open and read aloud, shall be held at the date, time, and place stated in the formal bid/proposal request issued by the Purchasing Department. Should a change to the bid/proposal time be required, it is the sole responsibility of the Purchasing Department to issue an addendum changing the due date and time of a bid/proposal opening. In the event of the closing of the Town Hall due to weather or any other unforeseen condition,

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the opening date shall be postponed until the same time on the next day that the Town Hall is open for business.

Sealed bid/proposal openings shall be conducted by the Purchasing Department or Purchasing Authority or its designee. The Purchasing Department shall maintain a record of bid/proposal opening attendees, record all responses, and maintain a file (in the Purchasing Department) of all ORIGINAL bid/proposal responses.

Any bid/Proposal marked or received after the time or date set in the request is ineligible and shall not be opened or considered.

In accordance with the Freedom of Information Act, suppliers have the right to request bid information. This information is usually available twenty-four hours after the bid opening. If a negotiation is to take place, the Town has the right to consider any information that is essential to the negotiation process confidential until the negotiation is concluded.

Bids/proposals received may be inspected by making an appointment with the Purchasing Department.

Section 9. *Bid/Proposal Review*

No award shall officially be made at a bid opening. The Purchasing Agent, along with the End User department-authorized personnel or designated board or commission member, shall review and analyze (including a financial or technical evaluation if necessary) all supplier bids/proposals with care, considering all appropriate factors dictated by the requirements of the original request. The End User Department shall make a recommendation, in writing, to the Purchasing Department regarding a procurement resulting from a formal solicitation. More complex solicitation responses may require more a more formal review or Qualifications-Based Selection Process (QBS).

Section 10. *Change Orders*

All requests for change orders to an existing Town purchase order or contract shall be forwarded to the Finance Director or Purchasing Department prior to any expenditure relating to that change order request being encumbered.

Section 11. *Qualifications-Based Selection (QBS) Process*

Generally, responses to a complex and detailed RFQ or RFP result in a formal selection process referred to as a Qualifications-Based Selection (QBS) Process. A QBS is the method by which companies are chosen based on the ranking of their qualifications specific to chosen criteria established by a Town Department and/or board or commission and a selection panel comprised primarily of Town employees and/or board or commission members. QBS is used where the project or service requirements are so unique or complex where it is required that selection criteria be primarily influenced by the bidder's knowledge and experience for similar or related projects or service. This process generally requires an interview process that shall be coordinated by the Purchasing Department.

When a QBS process is desired by the requesting department and/or board or commission that has the responsibility for the project or service, that department-authorized personnel and/or board or commission chairman shall include that requirement in the RFP or RFQ specifications. Generally, if it is the intention of the Town to use a QBS selection panel, that information and the selection criteria is included in the RFP or RFQ documents.

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With all QBS processes, a selection panel shall be recommended by the department-authorized personnel and/or board or commission chairman. In all instances, one of the members of a selection panel shall be the Purchasing Authority or a designated member of the Purchasing Department.

The initial purpose of the selection panel shall be to establish the specific criteria and assign weights by which responses received shall be evaluated. The specific criteria and related weights to be used in the evaluation process by the selection panel must be stated in all documents relating to the QBS procurement process. Additionally, the selection panel shall formulate a set of questions that will be utilized in the interview process. The Purchasing Department shall coordinate the date and time for interviews to occur and formally invite all attendees.

Proposals received shall be evaluated by the same selection panel. Each member of the selection panel shall evaluate independently by numerical scoring all responses received, using the criteria and weighting established for the second step of the QBS process, that being the bid or proposal evaluation process. From each selection panel member's scoring shall be derived a combined scoring of the full selection panel, which shall lead to a ranking of all bids/proposals received. The numerical scoring of each selection panel member shall be kept as part of the records related to each QBS process.

The selection panel shall make a written report of its selection, the criteria used, and its recommendation for award to the department-authorized personnel. The department-authorized personnel shall write a memorandum to the Director of Purchasing requesting that the award be made to the specified company.

The Town of Trumbull reserves the right to reject any and all quotes or bids deemed not to be in the best interests of the Town and to waive any defects or informalities in a bid or proposal.

Section 12. Supplier Selection and Awards

Purchase orders and/or contracts are awarded solely by the Purchasing Authority through its Purchasing Department to the *lowest responsive and responsible bidder* whose bid/proposal complies with all of the provisions of the Request for Proposal/Qualification required to render it acceptable. The lowest proposed price is only one of the factors used in the selection process; the proposer who provides the best overall value and ability to provide the stated outcome and service, at a price that can be accommodated by the Town, shall be selected. Other factors such as quality, performance and/or technical capability, service, ability to meet delivery requirements, supplier history, references, etc. may outweigh the lowest proposed price. Additional factors to be considered are the content and quality of the proposal and how well it addresses the criteria of the Request for Proposal/Qualification/Bid.

Any scoring matrix used in the selection process shall be fairly and equitably applied to all responding bidders.

The Purchasing Department shall consult with the End User Department in its bid evaluation process for more complex and technically sophisticated procurements. It is the objective of the Purchasing Department to assure that all goods and services purchased meet the stated required needs (specifications) of the End User Department.

It should also be noted that simply because a supplier was previously the low bidder and supplier of a particular good or service, that shall not be used as evidence that said supplier is the best source for the current requirement.

TOWN OF TRUMBULL PURCHASING POLICY AND PROCEDURES

The Town of Trumbull reserves the right to reject any and all bids, quotes, or proposals not deemed to be in the best interests of the Town, or to accept that bid, quote or proposal which appears to be in the best interests of the Town.

The Town reserves the right to waive any informality or to reject any or all proposals and advertise for new proposals, if in its opinion the best interests of the Town will be served. The Town may require any or all bidders to present evidence of experience, ability and financial standing as well as a list of personnel or equipment they will have available for the execution of a contract or purchase order.

A department making a recommendation for award shall state in writing to the Purchasing Department the justification for the award. This recommendation shall be filed permanently in the related bid file.

Section 13. Withdrawal of Award

The Town reserves the right to withdraw an award made to a bidder/proposer if the bidder/proposer does not satisfy the conditions upon which the award was based within the specified time frame. Such conditions could consist of, but not be limited to, insurance and bond requirement documentation. Other valid reasons for the Town's withdrawal of an award could include, but not be limited to, erroneous or false information submitted in the bid/proposal or funding becoming unavailable for the goods, service or project.

Section 14. Bid Waiver

Under certain circumstances, it may be in the best interests of the Town to waive the requirement for the competitive bid/proposal process for a specific procurement.

All requests to waive the bid/proposal process requirements (Bid Waiver) shall be submitted via formal memorandum directly to the Purchasing Department, Director of Finance, and First Selectman. Bid waivers in excess of \$500,000 must receive Town Council approval by 2/3 vote of the Town Council members present and voting. The memorandum shall contain pertinent information relative to the procurement along with rationale and reasoning as to why a waiver is deemed to be in the best interests of the Town. Additionally, the request shall address the total anticipated dollar expenditure and general ledger account to be charged.

Purchases made in conjunction with the Bid Waiver Process shall only be issued to a supplier by the Purchasing Department upon the First Selectman's signed approval of a Bid Waiver request and upon receipt of a formal requisition. The record of any purchase made pursuant to a bid waiver shall include a copy of the waiver and shall be kept on file in the office of the purchasing authority where it shall be open to public inspection.

Section 15. Prevailing Wages

In contracts for new construction of any public works project where the total cost of all work to be performed by all contractors and subcontractors exceeds one million dollars (\$1,000,000), and in contracts for remodeling, refinishing, refurbishing, rehabilitation, alteration or repair of any public works project where the total of all work to be performed by all contractors and subcontractors exceeds one hundred thousand dollars (\$100,000), all tradesmen and laborers hired to perform under the contract shall be paid at the prevailing wage rates for the same work in the same trade in the Town and shall receive the fringe benefits normally offered at that time for the particular trade. "Prevailing rates" as used herein shall mean the latest rates published by the State of Connecticut Department of Labor unless otherwise required to qualify for a federal grant pertaining to the contract. As used herein, the term "contractor" shall include the general or prime contractor and shall include subcontractors

TOWN OF TRUMBULL PURCHASING POLICY AND PROCEDURES

performing work under the contract.

Upon receipt of request for and RFP or RFQ, the Purchasing Department shall request current prevailing wage rates from the State of Connecticut Department of Labor for inclusion in the formal bid/proposal.

Section 16. CHRO Requirements

Any state funding, including but not limited to Local Capital Improvement (LOCIP), Alliance, and BOE grants from the state of Connecticut that is \$ 50,000 or more must follow the Commission on Human Rights and Opportunities (CHRO) process which is listed on the CHRO website at <https://portal.ct.gov/CHRO/Contract-Compliance/Contract-Compliance/Contract-Compliance-Forms-and-Reports>.

Bid Notice Language (for print media): This contract is subject to state set-aside and contract compliance requirements.

Bid Language (for bid documents): The contractor that is selected to perform this State project must comply with Conn. Gen. Stat. §§ 4a-60, 4a-60a, 4a-60g, and 46a-68b through 46a-68f, inclusive, as amended by June 2015 Special Session Public Act 15-5. State law requires a minimum of twenty-five (25%) percent of the state-funded portion of the contract for award to subcontractors holding current certification from the Connecticut Department of Administrative Services ("DAS") under the provisions of CONN. GEN. STAT. § 4a-60g (25% of the work with DAS certified Small and Minority owned businesses and 25% of that work with DAS certified Minority, Women and/or Disabled owned businesses.) The contractor must demonstrate a good faith effort to meet the 25% set-aside goals. For municipal public works contracts and quasi-public agency projects, the contractor must file a written or electronic non-discrimination certification with the Commission on Human Rights and Opportunities. Forms can be found on the CHRO website.

Section 17. State of Connecticut Construction Contractor Prequalification Program

The State of Connecticut's Construction Contractor Prequalification Program, Conn. Gen. Stat. Sec. 4a-100 et seq., requires that all contractors prequalify before they can bid on projects that meet the following criteria:

- Project must be for construction, alteration, remodeling, repair or demolition of a public building
- Estimated cost of the project is more than \$500,000
- Project is funded in whole or in part with State of Connecticut funds.

Prequalification information shall be submitted with related bid/proposal responses at the required date and time. Failure to submit the required Prequalification information may result of rejection of a bid/proposal response. Note: In certain instances, the Town may accept a proposal if a Prequalification application is in process with the State. That situation must be disclosed by the responder in the bid/proposal submittal.

Section 18. Contract Development

Building improvements, public works construction and/or maintenance projects, and services shall be procured through the competitive bidding (RFQ/RFP) process and developed into contracts.

Formats for contracts shall be in a manner established and approved by the Town Attorney. The Purchasing Authority and/or Purchasing Department shall coordinate this effort through final contract execution.

**TOWN OF TRUMBULL
PURCHASING POLICY AND PROCEDURES**

CHAPTER 7. GENERAL PROCUREMENT

A department/commission head shall designate authorized staff personnel to prepare purchase requisitions or order supply forms. All requisitions or order supply forms shall include estimated prices along with recommended supplier information and must be approved by the Department Head or designated individual per Chapter 4. The approved requisition or order supply form is then forwarded to the Finance Director (Purchasing Authority) via the Town's Financial System (MUNIS) for approval and then released to the Purchasing Department for processing.

The Purchasing Department is responsible for issuing all Purchase Orders. Purchase Orders shall not be issued unless appropriated funds are available.

In all procurement activities, the Purchasing Department shall comply with Town, State of Connecticut and Federal guidelines.

**TOWN OF TRUMBULL
PURCHASING POLICY AND PROCEDURES**

CHAPTER 8. THE BUYING PROCESS

Section 1. Contract

A contract is a written agreement between the Town and another party stating the term and conditions under which such party will perform a service or provide a product. The contract must designate terms, conditions and prices for providing goods or services within a specific period of time. There are two basic contract forms used by the Town - purchase orders and formal contracts (which may also be referred to as Agreements).

All formal contracts shall be executed by the Purchasing Authority (Finance Director). No other Town official, board or commission member is authorized to execute a formal contract with another party to perform a service or provide a product to the Town.

Section 2. Requisition/Order Supply Form

The document and process used by a Town Department, agency, board or commission to authorize and request the Town's Purchasing Authority to purchase any and all supplies, materials, services, equipment and other commodities as required.

A requisition or order supply form shall include a complete description of the goods or services, required delivery/completion dates, any supporting documentation such as drawings, specifications, etc., recommended suppliers (if any), and an estimate of the anticipated unit cost.

The Purchasing Authority determines the format, form, and method to be utilized for the requisition or order supply form and procurement of goods or services. Generally, all requisitions and direct purchase orders shall be created in the Town's Financial System.

Section 3. Purchase Order

A Purchase Order authorizes a supplier to furnish goods or services and acknowledges the commitment of the Town to pay in accordance with the agreed upon terms with a firm performance date. The purchase order represents an offer to the seller, and it is not a contract until the supplier either has acknowledged the purchase order in writing or has performed (delivered) in accordance with the terms of the purchase order.

A Purchase Order contains a description of the specific item or services being purchased that are specific to that order.

The basic parts of a purchase order may include:

- Purchase Order Number (with change number if applicable)
- Requisition Number
- Tax Exempt Number
- The full legal name and address of the supplier
- The Town ship-to location
- Supplier number
- Freight payment terms
- Description (in a brief and accurate manner) of the goods or services being purchased, quantity, unit cost and extended price
- List of attachments, if applicable
- Signature of an authorized buyer and Town agent

TOWN OF TRUMBULL PURCHASING POLICY AND PROCEDURES

- Reference to a bid or contract that is in force if applicable
- Documentation from requisition

The Purchasing Authority determines the format, form, and method to be utilized for the purchase of goods or services.

Section 4. Sole Source Item is when only one source is located, after a thorough search of the marketplace, that can provide a particular product or service to meet the Town's requirements.

Section 5. Single Source Item occurs when a requirement is defined so narrowly that only one supplier can provide the product or service. Generally, this is not in the Town's best interests and goods and or services that are functionally equivalent should be specified in a request for proposal/quote. However, if such a situation is unavoidable, full justification for such a limitation should be documented by the End User Department and depending on the dollar threshold may require approval through the Bid Waiver process.

Some reasons for selecting a sole or single source may include the following:

- The supplier is the only authorized distributor of a specified product or service in the immediate area.
- Emergency conditions exist where the urgency of obtaining the items or service needed outweighs all considerations of possible price savings through competitive bidding.
- A reasonable attempt to identify comparable sources has been unsuccessful.

Section 6. Design Build Services are a subset of Single Source Contracting. Design Build Services can be a cost-efficient method of purchasing for construction projects. Under this method, the architect and construction manager are awarded one contract based on a single RFP. Generally, a project will be overseen by a Building Committee created by the Town Council, which preferably will include one or more construction professionals.

Prior to issuing a Request for Proposal for any Design Build (or construction management) project, the Purchasing Authority will document that a) the Design Build (or construction management) contract is more advantageous than a competitive sealed bid construction contract, b) there is a benefit to the Town by using a Design Build (or construction management) contract, and c) competitive sealed bidding is not practical or fiscally advantageous.

Section 7. *Supplier Identification*

The Purchasing Department has overall responsibility for supplier identification and qualification. Supplier identification and qualification is a continuing process ensuring that our suppliers are providing the Town with the best values in terms of total cost, quality and service. A list of suppliers will be maintained and the marketplace will be periodically tested and suppliers added or deleted to ensure that the Town has an appropriate number of suppliers to meet its requirements.

Section 8. *New Suppliers*

There will be no commitment to purchase goods or services from a supplier not listed in the most current Supplier Data Base (MUNIS) without prior approval of the Purchasing Department.

Should a department, board or commission wish to add a new supplier to the Supplier Data Base, a “**New Supplier Request Form**” (**Attached**) shall be completed and forwarded to the Purchasing Department for acceptance prior to any solicitation or purchase is made with the new supplier.

**TOWN OF TRUMBULL
PURCHASING POLICY AND PROCEDURES**

It is the sole responsibility of the Purchasing Department to determine if a new supplier is approved to supply the Town with goods or services.

Consideration for Supplier Acceptance may be as follows:

- References provided through contracts with firms currently served by the supplier
- Financial stability
- Experience
- Capabilities and technological abilities

Section 9. *Disqualified Suppliers and Bidders*

The Purchasing Department has the authority to declare suppliers who default on quotations and services, and suppliers (or principals/owners of the suppliers) who are in default of payment of taxes and other obligations to the Town, disqualified from receiving further business from the Town for a stated period of time. Suppliers may be removed from the Purchasing Department's supplier list for a period up to two years. Reinstated suppliers shall be on "probation" for a period of one year. If further problems occur, a supplier may be permanently removed from the supplier list.

Section 10. *Unauthorized Purchases*

Unless as provided herein, no Town official, department head, employee, or board or commission member shall purchase any goods or services for Town government purposes other than through the Purchasing Department. Any purchases ordered outside of the provisions included herein shall not be approved and the Town shall not be bound to accept or pay for those purchases.

**TOWN OF TRUMBULL
PURCHASING POLICY AND PROCEDURES**

**CHAPTER 9. REQUISITION/ORDERING
PROCEDURES**

Section 1. Requisition Preparation and Time Frame

Purchase requisitions shall be issued and approved by department heads or department-authorized personnel for all purchases of materials and services through the Town's Financial System, MUNIS. The requisition must include supplier name and address, account number to be charged, date of issue, quantity and description of goods and services, price, date required, and any such documentation as may be required by the Purchasing Department to facilitate the procurement. In all instances, departments shall assure sufficient lead time to prevent emergencies and allow for standard processing of a Purchase Order and delivery of requested goods and/or services.

All requisitions created in the MUNIS system are first electronically forwarded to the Finance Director for approval and then released (electronically) to the Purchasing Department. It shall be noted that the Purchasing Department cannot process a requisition in the MUNIS system until such time that it has been approved and released by the Finance Director.

Section 2. Verbal Request for Pricing/Procurement

It is generally not the policy of the Purchasing Department to accept verbal requisitions from departments. Exceptions shall be considered by the Purchasing Department in the case of legitimate emergencies.

Section 3. Verbal Orders

Verbal orders are purchase orders placed only by the Purchasing Department to a supplier in person or by telephone.

Section 4. Order Supply Forms

In the case of emergencies, an order supply form may be utilized by authorized department personnel for the purchase of material, equipment, supplies or services under \$1,000. Order supply forms shall be presented immediately to the Purchasing Authority along with all necessary supporting documentation for approval of the Purchasing Authority. Upon approval of the Purchasing Authority, the order supply form shall be forwarded directly to Purchasing Department and a purchase order shall be issued to a supplier. (**Order Supply Form - Attached**)

Order supply forms may also be used to request routine "low dollar" miscellaneous office supplies under one thousand (\$1,000) dollars in total. These order supply forms shall be signed or approved by the department-authorized personnel and directly forwarded to the Purchasing Department for processing. It is not permissible to circumvent this rule by making multiple requests for the same "low dollar" purchase(s).

Section 5. Publicly Bid Contracts and Use of Consortia

The Town shall avail itself of State and/or Federal contracts and consortia when it is considered to be in the best interests of the Town to do so, and participate in existing contracts that have been competitively bid under rules corresponding to those set forth in these Purchasing Policy and Procedures. Acceptable cooperative purchasing contracts shall include, but are not limited to, those specifically extended to political subdivisions and municipalities and issued by Public Purchasing Association of Connecticut (PPAC), Connecticut Regional Council of Governments (CRCOG), the Connecticut Source, and the State of Connecticut, Connecticut Regional Education Council (CREC), National Institute of

TOWN OF TRUMBULL PURCHASING POLICY AND PROCEDURES

Government Purchasing (NIGP), Sourcewell, National Joint Powers Alliance (NJPA), and through the Department of Administrative Service (DAS). The use of such contracts shall be approved by the Purchasing Department and the terms and conditions set forth in the contract shall be adhered to by the Town. The Purchasing Department can also use other municipalities' bids.

In order for a Publicly Bid Contract to be considered, the contract must be in force at the time of the procurement and be for the goods and/or services referenced in the contract. The contract number shall be included on the requisition and purchase order.

Section 6. *Sale of Surplus Town Equipment*

Surplus property/equipment owned by the Town of Trumbull shall be disposed of by the following procedure:

The department-authorized personnel shall notify the Purchasing Authority in writing of the surplus property/equipment and provide the description – (year, model, manufacturer, and age, etc.) and general condition. The final decision to sell surplus Town equipment and disposition of the proceeds from the sale shall be made by the Purchasing Authority. Surplus items may be offered to other departments within the Town, including the Board of Education. All surplus property/equipment shall be sold "as is."

Upon approval of the Purchasing Authority, the Purchasing Department shall advertise in a local newspaper and on the Town website the surplus property/equipment that is available, including its condition and location. The advertisement shall call for sealed bids that shall be due to the Purchasing Department or its designated agent at an announced date, time and location determined by the Purchasing Department, at which time the responses shall be publically opened. An award will be made to the firm or person who bids the highest dollar figure for each item.

Payment for surplus shall be made by wire transfer or ACH to the Town of Trumbull. The removal of sold property/equipment shall be within a reasonable agreed to time period between Town and Buyer after the sale. All proceeds from the sale of Town surplus property/equipment shall be forwarded immediately to the Purchasing Authority.

The Town of Trumbull reserves the right to reject any and all bids, not deemed to be in the best interests of the Town, or to accept a bid which appears to be in the best interests of the Town.

STATEMENT OF QUALIFICATIONS

Submitted by:

Name of Organization _____

Name of Individual _____

Title _____

Address _____

Telephone _____ Fax: _____ Cell: _____

STATEMENT OF QUALIFICATIONS (To be submitted with proposal)

Submitted by:

Name of Organization _____

Name of Individual _____

Title _____

Address _____

Telephone _____ Fax: _____ Cell: _____

General Business Information

Check If: Corporation Partnership Joint Venture Sole Proprietorship

If Corporation:

a. Date and State of Incorporation

b. List of Officers

Name Title _____

If Partnership

a. Date and State of Organization

b. Names of Current General Partners

c. Type of Partnership

General Publicly Traded

Limited other (describe): _____

If Joint Venture:

a. Date and State of Organization

b. Name, Address and Form of Organization of Joint Venture Partners: (Indicate managing partner by an asterisk*)

If Sole Proprietorship:

a. Date and State of Organization

b. Name and Address of Owner or Owners

1. On Schedule A, attached, list major engineered construction projects completed by this organization in the past five (5) years.

(If a joint venture list each participant's projects separately).

2. On Schedule B, attached, list current projects under construction by this organization. (If joint venture, list each participant's projects separately).

3. Name of Surety Company and name, address, and phone number of agent.

4. Is your organization a member of a controlled group of corporations as defined in I.R.C. Sec. 1563?

Yes No

If yes, show names and addresses of affiliated companies.

5. Furnish on Schedule C, attached, details of the construction experience of the principal individuals of your organization directly involved in construction operations.

6. Has your organization ever failed to complete any construction contract awarded to it?

Yes No

If yes, describe circumstances on attachment.

7. Has any Corporate officer, partner, joint venture participant or proprietor ever failed to complete a construction contract awarded to him or her in their own name or when acting as a principal of another organization?

Yes No

If yes, describe circumstances on attachment.

8. In the last five years, has your organization ever failed to substantially complete a project in a timely manner?

Yes No

If yes, describe circumstances on attachment.

I hereby certify that the information submitted herewith, including any attachment is true to the best of my knowledge and belief.

Name of Organization: _____

By: _____

Title: _____

Dated: _____

Schedule A: Prior Similar Projects (Add Additional Pages as Needed)

Project	Owner	Design Professional	Contract Price	Amount Completed	Date of Delivery / Installation

Schedule B: Current Similar Projects (Add Additional Pages as Needed)

Project	Owner	Design Professional	Contract Price	Amount Completed	Date of Delivery / Installation

Schedule C: Personnel (Copy Additional Pages as Needed)

Name	Position	Date of Hire	Date Started in Construction	Prior Positions & Construction Experience

TOWN OF TRUMBULL
REQUEST FOR FORMAL BID/QUOTATION, PROPOSAL, INFORMATION OR QUALIFICATIONS

Description of Project/Service/Item: _____

Requesting Department: _____

Primary Department/Commission Contact: _____

Phone: _____ Fax: _____ Email: _____

Estimated Procurement Value: \$ _____ Approved Budgetary Value: \$ _____

General Ledger Account(s) to be charged: _____

Required Response Date: _____ Required Delivery Date: _____
(ASAP is not an acceptable date)

Engineer/Architect/Consultant: _____
(If Applicable) _____
(Name & Phone)

A Detailed written Specification/Description and/or Statement of Work Detailed Description, Detailed Drawings, etc. must accompany this request (*Forward to the Purchasing Department in MS Word Format*). Summarize any pertinent facts – attach documentation as necessary.

History (If Applicable): _____
(Prior Procurement (PO), Date, Price, Supplier - or – Identify Similar Prior Procurement)

Recommended Suppliers (*Include company name and contact information*): _____

Standard procedure is that formal notices are listed in the Ct Post & Town Web Site. List any additional publication requirements: _____

	Name	Signature	Date
Requested by:	_____	_____	_____
Approved by:	_____	_____	_____
Approved by:	(Department Head/Committee Chair)	_____	_____
Approved by:	(Finance Director)	_____	_____

To be completed by the Purchasing Department

Received Purchasing:	RFQ/RFP/RFI # _____ Bid Notice Publication Date: _____ Due Date: _____
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TOWN OF TRUMBULL
NEW SUPPLIER REQUEST FORM

(Prior to completing this request form please verify that supplier is not in Munis data base or call A/P for help)

Company Name: _____

DBA (if any): _____

Address: _____

City/State: _____ Zip Code: _____

Remit to address: _____

(If different from above)

City/State: _____ Zip Code: _____

Phone: _____ Fax: _____

Website: _____ W-9 [Fed Tax ID/SS] Attached (Required)

Primary Contact: _____ Title: _____ Phone: _____

Fax: _____

Cell: _____ Email: _____

Company's primary product or service: _____

To be completed by the Purchasing Department

Received:	Vendor Number:
Approved:	Date of Input:

Reason for Addition to Supplier List: _____

Will this supplier be a permanent ACTIVE supplier? Yes: _____ No: _____ Unknown: _____

TOWN OF TRUMBULL
PURCHASING DEPARTMENT

OFFICE SUPPLY ORDER FORM

DEPARTMENT:
BUDGET ACCOUNT:
VENDOR/SUPPLIER (Name & Vendor #):

PLEASE PRINT CLEARLY OR TYPE

Quantity	Unit of Measure	Item Number	Description	Unit Price	Extended Price
0				\$ -	\$ -
0				\$ -	\$ -
0				\$ -	\$ -
0				\$ -	\$ -
0				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
1				\$ -	\$ -
TOTAL					\$ -

REQUESTED BY: _____
PRINTED NAME/DEPT _____ DATE _____

AUTHORIZED AND APPROVED BY: _____
DEPARTMENT HEAD _____