



CITY OF LONG BEACH PURCHASING DIVISION

GUIDELINES

<http://clbnet/purchasing/guidelines.asp>

No products/services may be ordered before any purchase order has been approved and issued.

The steps listed below must be completed before any products/services are obtained.

Contact the Purchasing Division at (562) 570-6200 with further questions.

PURCHASING GUIDELINES THAT APPLY TO ALL THRESHOLDS

- ✓ Departments may only utilize the Purchasing Guidelines for products/services not available under CLB Citywide Blanket Purchase Order (BPO) Program.
- ✓ Professional services require Professional Services Additional Terms and Conditions. (http://clbnet/purchasing/professional_services/default.asp)
- ✓ If applicable, insurance certificate must be approved by Risk Management. (<http://www.longbeach.gov/hr/about-us/insurance-requirements/>)
- ✓ All technology-related purchases shall be approved by the Department of Technology and Innovation.
- ✓ All procurement documentation shall be retained by the Department for 5 years.
- ✓ Grant-funded purchases shall adhere to all grant requirements.

DOLLAR AMOUNT	STEPS FOR DEPARTMENTS
\$0 - \$2,500 Department issues Direct Purchase Order (DPO)	<ul style="list-style-type: none"> ✓ Vendors utilized for these transactions shall be registered in the City's bid notification system. ✓ Departments are encouraged to seek Long Beach-based businesses. ✓ No bidding required. ✓ Departments shall exercise due diligence to perform cost comparison. ✓ Departments shall retain backup documentation to support purchase (i.e. quote, proposal, etc.).
> \$2,500 - \$25,000 Department issues Direct Purchase Order (DPO)	<ul style="list-style-type: none"> ✓ Vendors utilized for these transactions shall be registered in the City's bid notification system. ✓ Departments are encouraged to seek Long Beach-based businesses. ✓ Informal bidding is required. Departments shall obtain 3 informal quotes. The following are acceptable: a) online pricing b) phone quote c) email quote d) fax quote d) catalog pricing. INFORMAL BID QUOTE FORM shall be completed as backup documentation. ✓ REQUEST FOR QUOTE FORM may be completed if a hard copy of the quote cannot be obtained from vendor. ✓ If a Department cannot get 3 quotes or cannot solicit for informal quotes, an INFORMAL BID QUOTE FORM - EXCEPTION portion shall be completed and signed by Department Director.



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DOLLAR AMOUNT	STEPS FOR DEPARTMENTS
<p>> \$25,000 - \$100,000 Department initiates, Purchasing Division issues Blanket Purchase Order (BPO) or Standard Purchase Order (SPO)</p>	<ul style="list-style-type: none"> ✓ Department initiates procurement process through Purchasing Division using PURCHASING REQUEST FORM. ✓ Purchasing Division administers ITB/RFP, posts ITB/RFP on bid notification system, provides local outreach, and complies with legal requirements. ✓ Purchasing Division posts Notice of Intent to Award (NOI) on bid notification system for ITB/RFP pursuant to protest procedures. ✓ City Manager Purchasing Approval Form (CMAF) is required. ✓ If bids/proposals cannot be obtained through ITB/RFP, an EXCEPTION TO POLICY FORM is required.
<p>> \$100,000 - \$200,000 Department initiates, Purchasing Division issues Blanket Purchase Order (BPO) or Standard Purchase Order (SPO)</p>	<ul style="list-style-type: none"> ✓ Department initiates procurement process through Purchasing Division using PURCHASING REQUEST FORM. ✓ Purchasing Division administers ITB/RFP. If 3 or more bids/proposals are received, no City Council approval is required. CMAF is required. ✓ Purchasing Division posts NOI on bid notification system for ITB/RFP pursuant to protest procedures. ✓ If a protest is received, product/service cannot be procured through ITB/RFP, or less than 3 bids/proposals are received, City Council approval is required.
<p>> \$200,000 Department initiates, Purchasing Division issues Blanket Purchaser Order (BPO) or Standard Purchase Order (SPO)</p>	<ul style="list-style-type: none"> ✓ Department initiates procurement process through Purchasing Division using PURCHASING REQUEST FORM. ✓ Purchasing Division administers ITB/RFP. ✓ Purchasing Division posts NOI on bid notification system for ITB/RFP pursuant to protest procedures. ✓ City Council approval is required.