



City of Riverside Administrative Manual

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Policy Owner(s): Finance Department

Approved:

Charles Mike Futrell

Department

City Manager

SUBJECT:

Contractor and Consultant Panels Utilization

PURPOSE:

To provide guidelines for the utilization of Contractor and Consultant panels.

SOURCE OF AUTHORITY: Charter of the City of Riverside, Section 601
Purchasing Resolution Article Two

POLICY:

City departments are allowed to utilize Contractor and Consultant Panels for various Professional Services and Construction Projects, (Design Build excluded) that have been approved according to Administrative Manual Number 07.022.00, (Panel Establishment). When seeking proposals/bids from an established panel, "ALL" members in applicable category are to be solicited, for informal and formal procurement. Contractor panel utilization for Public Works are subject to Section 1109 of the City Charter; or Section 1202(b) for Public Utilities. NOTE: Only contractor panels established for RPU construction may exceed the formal bidding threshold for a single project (when noted as part of the Master Agreement and approved by the Board of Public Utilities), all other construction panels may not exceed the formal bidding threshold per project unless otherwise noted by the City Charter.

PROCEDURE:

Responsibility	Action
Originating Department	<ol style="list-style-type: none"> 1. Obtains necessary approval to begin the procurement process as authorized by Department Head. 2. Develops specific project scope and specifications, and submits to Purchasing Division for posting on the City's Web-site bidding system. (If estimated project is under the formal bidding threshold

PROCEDURE:

Responsibility	Action
	the originating department may solicit directly from "ALL" Panel Members within the applicable category as an Informal Procurement.
Purchasing	<ol style="list-style-type: none"> 3. Provides evaluators contact information to Purchasing Division, (minimum 3 individuals). (RFP's only) 4. Reviews and posts the RFP or Bid information on the City's Website – Bidding System by invitation only to panel list. 5. Conducts procurement activities in accordance with state and federal laws, industry best practices, current Purchasing Resolution, and the City Charter. 6. Collects and reviews the proposals submitted by the prospective firms to conduct pre-screening and pre-qualification based on the following criterion listed in the RFP as applicable. 7. Forwards the information to the selected evaluation team. (RFP's only)
Evaluation Team (RFPs only)	<ol style="list-style-type: none"> 8. Individuals review and evaluate all proposals and submit their own evaluation documentation to the Purchasing Division liaison for review.
Purchasing	<ol style="list-style-type: none"> 9. Reviews and tabulates all submitted evaluation/bid data, and concurs with or rejects and forwards determination onto the originating department.
Originating Department	<ol style="list-style-type: none"> 10. Negotiates terms of supplemental agreement (if necessary) with selected candidate. 11. Requests supplemental agreement(s) from CAO with the "Request for City Attorney Services" form.
City Attorney's Office	<ol style="list-style-type: none"> 12. Drafts supplemental agreement as applicable and sends to originating department.
Originating Department	<ol style="list-style-type: none"> 13. Sends supplemental agreement to selected panel member for signature. 14. Receives "wet signature" of supplemental agreement: <ol style="list-style-type: none"> a. If funds for contract are included in Originating Department's approved budget the contract is routed utilizing the "Department Head Approval, Contracts/Agreements" form: <ol style="list-style-type: none"> i. Submits contract to CFO for certification as to funds availability; ii. Submits contract to City Attorney for approval as to form; and iii. Submits required insurance documents to Risk Manager for approval as to form. b. If funds for contract are not included in Originating Department's approved budget (or prior approval for use of panel did not exceed formal threshold):

PROCEDURE:

Responsibility	Action
	<ul style="list-style-type: none"> i. Prepares a City Council agenda report or RPU Board Report regarding selection of consultant or firm, scope of work to be performed, fee proposal, and budget transfer information and submits for approval. If Advisory Board exists, Originating Department may submit report to such board for approval prior to routing for CMO approval. ii. Submits contract to City Attorney for approval as to form. iii. Submits required insurance documents to Risk Manager for approval as to form.
City Attorney	15. Approves contract as to form and prepares and submits document transmittal form.
Risk Manager	16. Approves/Verifies required insurance documents as to form and provides copies to City Clerk.
Originating Department	<p>17. Collects supplemental agreement(s) signed by candidate(s) and submits City Council Memo/Report if over \$100,000, and RPU Board Report if over \$50,000 for review and concurrence; unless Utility Panel Master Agreement authorizes higher approval authority as permissible is Section 1202(b) of Charter. Supplemental agreements exceeding \$50,000 for RPU construction will be sent to Contractor AFTER RPU Board approval has been given or as otherwise stated in the Master Agreement(s). (See #21 for lower threshold agreements).</p> <p>18. Once Concurrence is obtained from Purchasing, Originating Department submits Agenda Report and supporting documents into Legistar/Agenda Manager.</p>
Purchasing	19. Posts Notice of Intent to Award on eProcurement platform with selection decision to firms if applicable.
City Manager's Office	20. Schedules item on proper agenda.
City Council/RPU Board	21. Takes appropriate action; if approved, authorizes budget transfer and execution of contract with selected firm.
City Clerk	22. Ensures that the contract, business tax certificate, and insurance documents have been approved as to form and that originals are on file in the City Clerk's Office.
City Manager or Department Head and City Clerk	23. City Manager signs supplemental as representative of the City based on appropriate approvals, or if contract does not exceed \$25,000 Originating Department Head may execute the contracts with City Clerk's attestation of signature.
City Clerk	24. Processes approved documents. Notifies Originating Department, City Attorney, Finance Administration, Purchasing

PROCEDURE:

Responsibility	Action
Originating Department	and Risk Management of contract execution, and sends a copy of the scanned contract when available. 25. Prepares Electronic purchase requisition in the current work order management system, with description of work to be performed, or service to be provided. Also, if City Council or RPU Board approval was required, attaches Council or Board Report, and approved minutes of the meeting. 26. Secures electronic approval of purchase requisition. Attaches copy of fully executed contract and supporting documentation to purchase requisition and retains the copies in Originating Department files.
Purchasing	27. Upon receipt of electronic purchase requisition, verification of approval level(s), and proper documentation, prepares purchase order to encumber necessary funds or requests additional documentation from the Originating Department as necessary. 28. Upon completing verification of proper documentation, releases purchase order for processing.
Originating Department	29. Upon completion of work by consultant, notifies City Clerk.