

City of Santa Fe, New Mexico

memo

DATE: May 5, 2015

TO: Finance Committee

FROM: Robert Rodarte, Officer
Purchasing Division *RR*

VIA: Oscar S. Rodriguez, Director
Finance Department

ISSUE: Sole Source Approval: Sam's Club (Santa Fe):

SUMMARY:

The Purchasing Division is requesting Sole Source approval to Sam's Club, for the continued procurement of goods and services for all City Wide Departments. As Purchasing Officer, I have conducted a good faith effort to locate additional sources within Santa Fe County that can provide the same type of Wholesale Service.

Section 16. Titled "SOLE SOURCE PROCUREMENTS" of the City Purchasing Manual allows for the Purchasing Officer to make a Sole Source determination.

The majority of the items purchased from Sam's Club are considered full case quantities. Senior Services purchases large quantities of supplies related to their "Senior in Home Services". Items such as Liquid Supplements (such as Ensure) and Adult Pads (such as Depends) are much cheaper in price utilizing the Sam's Wholesale Price Method, in comparison to purchasing through the local retailers. Other departments such as the GCCC utilize Sam's for the large quantities of products related to the youth programs.

Sam's Club employs 170-180 people, with the majority of them living in Santa Fe County. The annual sales volume exceeds \$100 Million, in which 55-60% is taxable, which accounts for approximately \$500,000 in GRT annually.

Purchase History:

Year Ending:	Procurement Dollars:	
6/30/2016	\$75,000	Projected
6/30/2015	\$42,772	(as of May 5, 2015)
6/30/2014	\$74,055	
6/30/2013	\$65,286	
6/30/2012	\$51,148	

The Purchasing Division is requesting the approval to utilize Sam's Club as a Sole Source Vendor for year ending 6/30/2016. The Sole Source request is currently posted on the City Website as of May 5, 2015.

Funding for the Sam's Club transactions come from all using departments.

ACTION:

It is requested that this Sole Source Award to Sam's Club, be reviewed, approved and submitted to the City Council for its consideration.

CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: Sam's Club

Procurement Title: Sole Source Wholesale Procurement

Solicitation RFP/RFB#: N/A

Other Methods: State Price Agreement *Cooperative* *Sole Source* *Exempt* *Other*

Department Requesting/Staff Member Finance/ Purchasing City Wide _____

Procurement Requirements:

A procurement file shall be maintained for all contracts, regardless of the method of procurement. The procurement file shall contain the basis on which the award is made, all submitted bids and proposals, all evaluation materials, score sheets, quotations and all other documentation related to or prepared in conjunction with evaluation, negotiation, and the award process. The procurement shall contain a written determination from the Requesting Department, signed by the procurement officer, setting forth the reasoning for the contract award decision before submitting to the Committees. .

SOLICITATION*

- | YES | N/A | |
|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Project Beginning History (council requests etc) |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Budget Determination (FIR) attach |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Solicitation document (RFP, IFB), |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Screen print of legal solicitation published in newspapers, web sites, etc.: |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Screen print of addendum(s) published on the IPB/RFP: |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Pre-Bid/Pre-Offer Conference attendance sheet and other documents |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | If canceled, screen print of cancellation of solicitation notice |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Other: _____ |

EVALUATION*

- | YES | N/A | |
|--------------------------|-------------------------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Blank evaluation form |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Evaluator's names and profiles |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Evaluation procedures or evaluation instructions |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Conflict/Confidentiality Forms signed by all Evaluators, Technical Advisors, Reviewers, and any person who assists in regard to the bid/proposal, evaluation and/or award |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Bid or Offer opening sheet(s) (If RFP, then two offer opening sheets, one for technical and one for cost) |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Screen print of Bidder/Offeror's detailed information |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Responsiveness review sheet or other sheet documenting responsiveness for each Bidder/Offeror, attach requests for additional information to cure items |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Non-Responsive/Non-Responsibility Form and correspondence or letters from Department to vendor regarding disqualifications |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Oral presentations (sign-in sheets, presentation materials, etc.) |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Documentation sent to Bidders/Offerors and responses received regarding clarifications, decisions, negotiations, and/or best and final offers, etc. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Reference Reviews/Reference Check Questionnaires |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Individual evaluations included for each RFP. |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Pricing evaluation |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Final overall evaluation matrix or summary of evaluator scores |

*

Other: _____

AWARD*

YES N/A

- Fully executed Memo to Committees from the Department with recommendation of award
- Winning proposal (this is a copy that has all confidential/proprietary information excluded)
- Screen print of Contract Award Notice
- Screen print of Award Notice published on agency website
- Email or notification sent to all Bidders/Offerors that award was made
- Waiver or "No Action Taken" from Procurement Office
- Correspondence with Procurement Office regarding waiver
- If IFB and not awarded to lowest responsive, responsible bidder; written explanation
- Other: _____

DISCLOSURES

YES N/A

- Contractor Disclosures & Conflicts of Interest**
Disclosures & Conflicts of Interest Form(s) (winning bidder(s)/offeror(s))
- Contractor –Conflicts of Interest**
Purchasing Office Letter or e-mail to designated individual regarding potential conflict
- Conflict of Interest Form signed by all parties
- Letter from Procurement Office regarding the potential conflict
- Subcontractor Disclosures**
Disclosures & Conflicts of Interest form of Subcontractor(s)
- Subcontractor –Conflicts of Interest**
Purchasing Officer Letter or email to designated individual regarding potential conflict
- Conflict of Interest form signed by all parties
- Letter from Legal Office regarding the potential conflict
- Other: _____

CONTRACT

YES N/A

- Copy of Executed Contract
- Copy of all documentation presented to the Committees
- Finalized Council Committee Minutes
- Other: _____

MISCELLANEOUS FILE*

YES N/A

- Local Preference Form
- New Mexico Residence Form
- Veterans Exemption
- Sole Source determination form approved by Procurement Officer**
- Exempt determination memo approved by Procurement Officer**
- Other: _____

Include all other substantive documents and records of communication that pertain to the procurement and any resulting contract.

PROTEST (If applicable)*

YES N/A

- x Documentation from protester filed with the Purchasing Office
- x Letter from Department to Purchasing Office Providing response to protest
- x Letter from Purchasing Officer to protester and Department on final outcome
- x Other: _____

Create a separate file folder which may contain any documents with trade secrets or other competitively sensitive, confidential or proprietary information.

YES N/A

- x Original bid(s) or proposal(s) with no redactions.
- x Documentation exempt - Proprietary, Confidential, Competitively Sensitive, or Trade Secret (i.e. e-mails, proposals, letters)

[Signature] - Purchasing Officer
Department Rep Printed Name and Title

Robert Redone
Department Rep Signature attesting that all information included

[Signature] Purchasing Officer
Purchasing Officer attesting that all information is reviewed
5/21/15