

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

GPM Section	Description of Change
<i>Introduction and General Overview</i>	
I.2.4. Partnership with Executive Agencies	<ul style="list-style-type: none"> • Added the University System of Georgia to the list of partnerships with SPD • Changed in Table I.3: <ul style="list-style-type: none"> ○ Secretary of State: The Secretary of State’s Office tracks annual corporate filings and grants professional licenses. ○ Added the University System of Georgia/Department of Archives and History: The Department of Archives and History provides resources which are relevant to the state’s procurement process such as information concerning policy governing retention of state government records. ○ Provided a link for the University System of Georgia/Department of Archives and History at http://www.georgiaarchives.org/ and the State’s Retention Schedules at http://www.georgiaarchives.org/records/retention_schedules
I.3.5. Business Status Considerations	<p>Revised entire section to add subsections for Minority, Small, GA Resident, and GA Resident Small Businesses:</p> <ul style="list-style-type: none"> • Changed the title of Section I.3.5. from “Small and Minority Businesses” to “Business Status Considerations” <ul style="list-style-type: none"> ○ Changed references of “small and minority” businesses in this section to “all” businesses ○ Added new subsection: I.3.5.1. Minority Businesses <p>In an effort to assist minority-owned businesses, Georgia law permits an income tax adjustment on the state tax return of any company that subcontracts with a certified minority-owned firm to furnish goods, property or services to the state of Georgia (O.C.G.A.) Section 48-7-38. Suppliers should consult with their tax advisors to find out how to</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

take advantage of these tax credits.

o Added new subsection: I.3.5.2. Small Businesses

Small business refers to a business which is independently owned and operated with either fewer than 300 employees or less than \$30 million in gross receipts per year (O.C.G.A) Section 50-5-121, 50-5-122. Small businesses are provided the opportunity to Price Match or receive up to 5% of the available points in RFP or RFQC solicitations as defined in 3.5.1.6. of this manual.

o Added new subsection: I.3.5.3. Georgia Resident Business

Georgia resident business refers to any business that regularly maintains a place from which business is physically conducted in Georgia for at least one year prior to any bid or proposal to the state or a new business that is domiciled in Georgia and which regularly maintains a place from which business is physically conducted in Georgia, provided, however, that a place from which business is conducted shall not include a post office box, a leased private mailbox, site trailer, or temporary structure(O.C.G.A) Section 50-5-121, 50-5-122. Georgia resident businesses are provided the opportunity to Price Match or receive up to 5% of the available points in RFP or RFQC solicitations as defined in 3.5.1.6. of this manual.

o Added new subsection: I.3.5.4. Georgia Resident Small Business

Georgia Resident Small Business refers to any business that meets both criteria of Small Business and Georgia Resident Business as defined above. Georgia Resident Small businesses are provided the opportunity to Price Match or receive up to 5% of the available points in RFP or RFQC solicitations as defined in 3.5.1.6. of this manual.

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

Chapter 1: Stage 1 – Needs Identification	
Key Steps	<p>Added new form to Table 1.1</p> <ul style="list-style-type: none"> SPD-NI007 Notice to Utilize Consortium Contract or Cooperative Purchasing Agreement.
1.2.3.1. Exempt from the State Purchasing Act	<p>Added clarification for Professional Services Exemption in Table 1.5:</p> <p>Exemptions for these services may be extended from the individual to a company, provided however, that the work products have been reviewed and validated as compliant by an individual with the level of certification required for that profession.</p>
1.3.4. Tier 4 - Convenience Statewide Contracts, Preferred Products, Consortia or Cooperative Purchasing and Open Market	<p>Changed:</p> <p>Entities are allowed to contract with a consortia-approved or cooperative-approved supplier after satisfying the public notice requirements detailed in Section 1.3.4.4. Consortia and Cooperative Purchasing (NOTE: following the Sole Source process is no longer required)</p>
1.3.4.3. Piggyback Purchases	<p>Changed for approved Piggyback purchases: a monthly report of spend is no longer required to be submitted to State Purchasing.</p> <p>Added: State entities must track spend against the contract to ensure their purchases do not exceed the approved amount permitted on their Piggyback Request.</p>
1.3.4.4. Consortia and Cooperative Purchasing	<p>Changed policy to align with new process (Note: The Georgia Procurement Registry will allow posting Consortia/Cooperative Notices on July 1, 2015):</p> <ul style="list-style-type: none"> Consortia or Cooperative Purchases will no longer follow the Sole Source policy (Section 2.3.2.2.). Added new Table 1.7 for guidelines on conducting a consortia or cooperative purchase: <ul style="list-style-type: none"> Conduct Market Research Prepare Consortium/Cooperative Purchasing Justification form (SPD- NI007)

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<ul style="list-style-type: none"> ○ Estimate Expected Contract Value and Route to SPD as needed ○ Post Public Notice (5 business days if value is under \$250,000 or 15 calendar days if value is \$250,000 or greater) ○ Invite Market Response (details listed on new Justification form, SPD- NI007) ○ Complete Protest Process ○ Contract Award (if no protest is successfully challenged, post Notice of Award)
1.3.5. Emergency Purchase	Clarity added: an emergency procurement is handled outside of the normal competitive process for purchases greater than \$24,999.99.
1.3.5.2. Notifying SPD of Emergency Purchases	<p>Modified:</p> <ul style="list-style-type: none"> • Non-Team Georgia Marketplace™ Users - completed Emergency Justification Form must be forwarded by the APO/CUPO via email to processimprovement@doas.ga.gov within five business days of the emergency purchase. • Team Georgia Marketplace™ Users - completed Emergency Justification Form must be attached at the header level of the PO in the system as well as other pertinent documentation relating to the emergency purchase.
Chapter 2: Stage 2 - Pre-Solicitation	
Key Steps	<p>Changed name of forms in Table 2.1:</p> <ul style="list-style-type: none"> • SPD-PS010 SWC RFP Project Plan changed to SPD-PS010 SWC RFX Project Plan • SPD-PS023 State Entity RFP Project Plan changed to SPD-PS023 State Entity RFX Project Plan <p>Added new form to Table 2.1:</p> <ul style="list-style-type: none"> • SPD-PS021 Fast Track RFP Request for Approval

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

<p>2.3.2.2. Conducting Sole Source Purchases Table 2.6, Step 5</p>	<ul style="list-style-type: none"> • Corrected typographical error for NIGP • Eliminated from Sole Source process: using sources of supply established by other states, consortia, or cooperatives
<p>2.3.3. Purchasing Used Equipment</p>	<p>Added:</p> <p>If an RFQ is not used when making a purchase of used equipment, the Procurement professional must comply with the provisions of Section 2.3.2. – Sole Source Purchases or Section 1.3.4.4. Consortia or Cooperative Purchasing.</p>
<p>2.4.2 Request for Proposals</p>	<p>Added clarity for when an RFP is used:</p> <ul style="list-style-type: none"> • If the end user wishes to evaluate the experience of the supplier and the quality of the supplier response to either a clear and accurate statement of work or to identify a supplier who can offer the best possible solution to the state entity’s identified needs. Additionally, an RFP should be used when the potential for amendments or refinement of scope may be required. • Added to sentence: Unless SPD has granted delegated purchasing authority to the state entity to make the RFP certification on its own, or to use the RFP Fast Track Process as detailed in Section 2.4.2.1.
<p>2.4.2.1. Fast Track RFP</p>	<p>Added new subsection:</p> <ul style="list-style-type: none"> • For non-complex solicitations under \$250,000.00 that are considered to be projects that do not require extensive customization, pilot of functionality, or negotiations of technical requirements, and which can be completed within 6 months of contract award • Added new Table 2.8 for Instructions to Fast Track an RFP: <ul style="list-style-type: none"> ○ Submit completed form, SPD-PS021 Fast Track RFP Request for Approval, to processimprovement@doas.ga.gov for approval by SPD Deputy Commissioner. (If approved, continue process.) ○ Contact a minimum of 5 suppliers to determine they are able to respond fully to the RFP and its worksheets and attachments within 15 calendar days of posting the solicitation. (If the majority of suppliers cannot meet this

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<p>timeframe, this Fast Track process should not be used.)</p> <ul style="list-style-type: none">○ Solicitation is posted using the State Entity RFP Template (SPD-SP015 or SPD-SP016); worksheets generated by the Requirements Sheet for RFP (SPD-SP057); and all required forms detailed in GPM Chapters 3 and 4. The solicitation will include one question and answer period, and will not include an offeror's conference or facilitated site visits. (Questions should be received within 5 calendar days of posting the solicitation and answered within 2 business days of receipt.)○ Upon receipt of the Supplier's response to the solicitation, the Issuing Officer will complete the Administrative Review as detailed in Chapter 5. (Suppliers who have submitted complete responses and all required forms will advance for evaluation.)○ An evaluation team composed of three (3) Entity employees will independently evaluate the Supplier's Responses prior to convening for a Validation Meeting. (The Supplier Technical Evaluation Form, SPD-SP007, is provided to the evaluation team with the proposals for their independent consideration, but is not required to be used or returned prior to the validation meeting.)○ Issuing Officer will convene a Validation Meeting of the Evaluation Team, and will facilitate the scoring of the proposals based on the independent scores provided by the Evaluation Team, using SPD-EP013 Master Technical Evaluation Template (which will serve as the official scoring mechanism for Fast Track RFPs).○ Issuing Officer then will open cost, combine the scoring of technical and cost components, and identify the winning proposal. If Cost Negotiations are required, the APO/CUPO, who has a Negotiations Certificate, may conduct Cost Negotiations. * (Determination of the winning Supplier is contingent on their full compliance with all required documents and signature by the Supplier of the Contract.) <p>* Technical Negotiations are not part of the Fast Track RFP process.</p> <ul style="list-style-type: none">○ Issuing Officer will document the award amount, timeframe of the solicitation, and alert State Purchasing if either the dollar amount or timeframe exceeded the approved thresholds prior to Notice of Award. (Issuing Office will post
--	---

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	NOIA or NOA, depending on award amount, as detailed in Chapter 6.)
2.6. Step 5 – Planning the Solicitation	<p>Changed:</p> <ul style="list-style-type: none"> • Table number changed from 2.8 to 2.9 • Name of form: SPD-PS023 State Entity RFP Project Plan changed to SPD-PS023 State Entity RFX Project Plan • Name of form: SPD-PS010 SWC RFP Project Plan changed to SPD-PS010 SWC RFX Project Plan
Chapter 3: Stage 3 – Solicitation Preparation	
Key Steps	<p>Table 3.1</p> <ul style="list-style-type: none"> • Added new forms: <ul style="list-style-type: none"> ○ SPD-SP013 Georgia Resident and Small Business Verification Form ○ SPD-SP014 Checklist for Bid Posting Times and Protest Filings ○ SPD-SP040 Consultant Confidentiality and Disclosure Agreement Form • Deleted form: <ul style="list-style-type: none"> ○ SPD-SP054 Immigration and Security Form • Notation added for: <ul style="list-style-type: none"> • SPD-SP042 Supplier General Information Worksheet * <p>*This form should only be used if the procurement professional is posting a solicitation directly to the Georgia Procurement Registry. Solicitations posted electronically through Team Georgia Marketplace™ or eSource will capture this information in the system from the supplier with each bid response.</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

<p>3.2. Using Third-Party Consultants</p>	<p>Revised this section to state:</p> <ul style="list-style-type: none">• Solicitations which have highly technical or complex requirements may require additional support from a third-party consultant to assist in the development of the solicitation.• A <i>third-party consultant</i> is an individual or company that is paid or unpaid to develop or draft specifications, or requirements for utilization in a solicitation.• Third-party consultants may also serve in a consultative role during the evaluation and negotiation process.• Third-party consultants who participate in this process will be required to complete and submit the Consultant Confidentiality and Disclosure Agreement Form, SPD-SP040, to ensure no individual has an impermissible conflict of interest and that confidential or proprietary materials are maintained in a secure manner as specified in the agreement.• The procurement professional will also use the agreement form to provide notification in writing to the affected contractor/company of their ineligibility to participate in the solicitation or subsequent work resulting from that contract.• Employees of a third-party consultant who are participating in the process are also required to complete and submit the General Confidentiality Form, SPD-EP026.• In such instance where a third-party consultant is utilized, the Entity must conduct the solicitation process and remain as the decision maker based on the input of the third- party consultant.• Changed:<ul style="list-style-type: none">○ Any third-party consultant who develops or drafts specifications or requirements of a solicitation document will be prohibited from submitting a bid/proposal in response to that solicitation, serving as an Evaluation Committee member (scoring the proposals), conducting the subsequent negotiation process, or from otherwise performing work on any contract or subcontract directly resulting from that particular solicitation document, unless the State Purchasing Division Deputy Commissioner expressly
---	---

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<p>waives this restriction in writing.</p> <ul style="list-style-type: none"> ○ Nothing in this section prohibits the procurement professional from soliciting information or preliminary market research from suppliers or third-party consultants through the RFI process . . .
3.3.1. eSource	Added: eSource cannot be used to post sole source or consortia/cooperative notices.
3.3.2. Team Georgia Marketplace™	Added: Sole-source and consortia/cooperative purchase notices must be posted directly to the GPR.
3.4. Selecting the Correct Solicitation Template	Deleted all references to SPD-SP054 in Tables 3.2, 3.3, and 3.4
3.5.1.2. Tax Compliance	Updated: Changed email address for submitting a completed tax compliance form to the Dept. of Revenue (to confirm supplier's tax compliance).
3.5.1.2. Tax Compliance 3.5.1.4. Scrutinized Company 3.5.1.5. Small or Minority Businesses	<p>References to SPD-SP042 Supplier General Information Worksheet are modified:</p> <p>This form should only be used if the procurement professional is posting a solicitation directly to the Georgia Procurement Registry. Solicitations posted electronically through Team Georgia Marketplace™ or eSource will capture this information in the system from the supplier with each bid response.</p> <p>NOTE: This change is effective in the above-mentioned systems July 1, 2015</p>
3.5.1.3. Immigration and Security Compliance – Service Contracts	<ul style="list-style-type: none"> • Deleted reference to State Purchasing's form: SPD-SP054 • Changed reference to Department of Audits and Accounts Immigration and Security Form • Provided link to Department of Audits and Accounts web site for locating the Immigration and Security Form: http://www.audits.ga.gov/NALGAD/section_3_affidavits.html

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

3.5.1.5. Small or Minority Businesses	Changed: Reference to Section I.3.5. Small and Minority Businesses is now changed to Section I.3.5. Business Status Considerations.
3.5.1.6. Georgia Resident Business, Small Business, or Georgia Resident Small Business	<p>Added new subsection:</p> <p>Where deemed appropriate by the Issuing Officer, based on relevant considerations including market research and funding source, solicitations should include statements encouraging Georgia Resident Business, Small Business, or Georgia Resident Small Business participation, specify the use of an additional scored question, and completion of SPD-SP013 Georgia Resident and Small Business Verification Form, as applicable, to receive not more than 5% of the total available points.</p>
3.5.2.1. Posting and Closing Dates, Table 3.5	<ul style="list-style-type: none"> • Revised Posting Dates in Table 3.5 to align with the \$25,000 Competitive Bid Threshold and to reduce posting periods (see attached document <i>SPD-014 Checklist for Bid Posting Times and Protest Filings</i> for details) • Added note below Table 3.5: Public posting guidelines for consortia and cooperative purchases are described in Section 1.3.4.4. Consortia or Cooperative Purchasing.
3.5.5.1.6 Price Matching Requirements	<p>Added new subsection to allow for Price Matching for RFQs:</p> <p>The RFQ should specify whether a price matching option will be available for Georgia Resident, Small Businesses, or Georgia Resident Small Businesses and any conditions under which it will be available. The ability to price match will only be granted to responsive and responsible bidders that are within 5% and \$10,000 of the lowest responsive and responsible bid. The indication by the supplier that the supplier will price match does not constitute further negotiation of pricing.</p>
3.5.5.2. RFP Technical Requirements and Questions	<p>Added:</p> <ul style="list-style-type: none"> • Any supplier that fails to answer an additional scored question cannot receive the points associated with the question. • If the solicitation includes provision of consideration for Georgia Resident, Small Business, or Georgia Resident Small Business, then the Issuing Officer must include, as part of the Additional Scored Worksheet, the SPD-SP013 Georgia

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	Resident and Small Business Verification Form.
3.5.8.3 Requests for Proposals	Modified to align with training: evaluation criteria should be established prior to the posting of the RFP.
Chapter 4: Stage 4 - Solicitation	
Key Steps	Added <i>new</i> form to Table 4.1: SPD-SPR014 RFX Cancellation Notice
4.5.11 Confirmation of Georgia Resident, Small Business, or Georgia Resident Small Business	<p>Added new subsection:</p> <ul style="list-style-type: none"> • By submitting a response to the solicitation, the supplier agrees to permit the state entity the right to verify its status as a Georgia Resident Business, Small Business, or a Georgia Resident Small Business in order to reasonably ascertain that the requested status may be considered in the evaluation process, and will facilitate access to the Issuing Officer in the performance of such inspection. • SPD-SP013 Georgia Resident and Small Business Verification Form will be used during the procurement process with the Additional Scored Worksheet in RFP and RFQC Solicitations.
4.8.2. Cancelling the Solicitation	Added use of new form, SPD-SPR014 RFX Cancellation Notice, to detail reasons for cancelling a solicitation
Chapter 5: Stage 5 – Evaluation Process	
Key Steps	<p>Added new forms to Table 5.1:</p> <ul style="list-style-type: none"> • SPD-EP016 Invitation to Negotiations • SPD-EP018 Negotiations Workbook <p>Modified form name for SPD-EP20 to RFQ Cost Negotiations (Best and Final Offer)</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<p>Modified note below Table 5.1: Only the State Entity APO/CUPO is authorized to use SPD-EP016, SPD-EP017, and SPD-EP018 as detailed in Section 5.8.1. RFP Rounds of Negotiation</p>
<p>5.6.2.3. General Checklist for Evaluating Solicitations</p>	<p>Added to Table 5.5:</p> <p>8. Ensure all Georgia resident and/or Small business considerations have been addressed.</p> <p>Added additional Rejection Reasons:</p> <ul style="list-style-type: none"> • Price Match GRB (RFQ) • Price Match SB (RFQ) • Price Match GRSB (RFQ)
<p>5.6.3.1. Evaluating Responses to RFQs</p>	<p>Modified:</p> <p>For all contracts established through the RFQ process, unless otherwise specified in the solicitation that price match has been allowed, award will be made to the lowest priced responsible and responsive supplier.</p>
<p>5.6.5.1. Reference Checks</p>	<p>This section is modified so that new subsections are added to detail the process for evaluating references by solicitation type:</p> <ul style="list-style-type: none"> • 5.6.5.1.1. RFP or RFQC Reference Evaluation Process <ul style="list-style-type: none"> ○ Client references must be evaluated by all members of the evaluation committee and validated as part of the evaluation process. A list of questions for the client references must be prepared in advance and posted with the solicitation. ○ References may be evaluated on a pass/fail basis. In the event points were reserved to score client references as part of an RFP or scored RFQC, the evaluation committee must evaluate the responses to the identified reference questions using the predefined scoring method and allocated points. ○ Sample suggestions for types of questions include:

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<ul style="list-style-type: none">- Nature and duration of the work,- Quality and quantity of supplies delivered or services rendered, (individuals served)- Timeliness of performance,- Number of changes and/or claims,- Business integrity—including behavior with subcontractors and regular payment of obligations to their suppliers and/or employees,- Willingness to cooperate, especially when confronted with unexpected issues, and/or- Effectiveness of management of the project and internal practices. <ul style="list-style-type: none">• 5.6.5.1.2 RFQ Reference Evaluation Process<ul style="list-style-type: none">○ Solicitation should require suppliers to submit client references as part of the suppliers' responses. During the evaluation process, the issuing officer has the discretion to ask suppliers to provide client references even if the solicitation did not require client references to be submitted.○ Issuing Officer should conduct reference checks for the RFQ Process and should be evaluated on a pass/fail basis. Intent for these checks should be for determining that the Supplier is Responsible.○ Sample suggestions for types of questions include:<ul style="list-style-type: none">- Nature and duration of the work,- Quality and quantity of supplies delivered or services rendered, (individuals served),- Timeliness of performance,- Contractual Issues related to Deficiency/Cure Process,- Criminal or Tax Compliance Issues.• A reference form is recommended for the RFQ Process but a phone call may be used to confirm information. The Issuing Officer is responsible for accurately documenting the findings of any reference check conducted to include the
--	---

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<p>date/time of the reference check, individual that was contacted, and any determination of a “failed” reference. These records should be maintained with the procurement file to support any removal of a supplier as non-responsible during the solicitation process.</p>
5.6.5.2. Oral Presentations and Product Demonstrations	<ul style="list-style-type: none"> • Added clarification: Oral presentations are made to all members of the evaluation committee • Changed requirement: For product demonstration scoring for RFPs/RFQCs, the evaluation committee will use scored questions to appropriately evaluate the quality of the presentation, the supplier’s ability to meet the needs of the solicitation, and to assist in the overall evaluation of the supplier.
5.6.6.5. Reciprocal Preference Law	<ul style="list-style-type: none"> • Added reference for Reciprocal Preference Law to O.C.G.A. Section 50-5-60 • Corrected link to Georgia’s Reciprocal Preference on the State of Oregon’s state-by-state listing: http://www.oregon.gov/DAS/EGS/ps/Pages/detail_a_main_page.aspx
5.8.1 RFP Rounds of Negotiation	<p>Modified to expressly authorize state entity APOs/CUPOs to negotiate during the RFP process upon completion of the Negotiation Certificate.</p>
5.8.1.1. State Entity’s Negotiation Authority	<p>Added:</p> <ul style="list-style-type: none"> • Any state entity desiring approval to conduct RFP rounds of negotiations, whose APO/CUPO has not yet completed a Negotiations Certificate, must submit an approval request to SPD at processimprovement@doas.ga.gov. • Any state entity, whose APO/CUPO has received a Negotiations Certificate by attending and successfully passing the associated exam, will have the capability to have that individual negotiate on their behalf up to the entity’s delegated purchasing authority.
5.8.1.3. Reasonably Susceptible to Contract Award	<p>Added: A state entity’s APO/CUPO is expressly authorized by SPD by completion of a Negotiations Certificate to conduct RFP rounds of negotiation.</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

5.8.1.4. Use of Negotiations Team	Added: The state entity RFP negotiation team will be headed by the APO/CUPO who has completed the Negotiation Certificate.
5.8.1.5. Negotiation Invitations	Added: Suppliers selected to participate in negotiations will be notified in writing by the issuing officer using SPD-EP016 Invitation to Negotiations.
5.8.1.6. Rounds of Negotiation and Rescoring	<p>Modified the following information in this section:</p> <p>In conducting such negotiations, there will be no disclosure to competing suppliers of any information contained in the competing suppliers' proposals (technical or cost). The APO/CUPO, having received a Negotiations Certificate, is authorized to disclose to each supplier that particular supplier's scores and/or overall ranking. However, cost scores should not be revealed to suppliers during negotiations if the state entity is using the cost formula described in Section 5.6.3.2.2. - RFP Cost Scoring or any other cost formula that has been disclosed to suppliers that would enable suppliers to calculate the amount of another supplier's cost proposal.</p> <p>SPD and the APO/CUPO that has completed a Negotiations Certificate, must use the SPD-EP016 Invitation to Negotiations and may also use the following resources to assist in the negotiations process: SPD-EP017 Negotiation Script and SPD-EP018 Negotiations Workbook. These resources may be released to a state entity upon that state entity's completion of negotiation training or as otherwise approved by SPD.</p> <p>Each supplier should use caution during the negotiation process in preparing the revised response to ensure any revised response still meets all RFP requirements. Should the State Purchasing Issuing Officer or APO/CUPO designated to complete the Negotiations Process on behalf of an entity choose not to have the original worksheets revised, then, at a minimum, the points negotiated, and agreed upon, must be included in a formal document, signed by both parties, and affixed to the contract agreement.</p>
5.10. Step 9: Re-soliciting When Necessary	Added use of new form, SPD-SPR014 RFX Cancellation Notice, to cancel a solicitation.

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

Chapter 6: Stage 6 – Award Process	
6.2.2.2. Notice of Award	<p>Added to Table 6.5:</p> <p>If the RFQ/RFP is sourced using the GPR directly (i.e., a non-electronic bidding process to include the posting of a Sole Source or a Consortia/Cooperative Purchase notice), a completed SPD-AP005 Notice of Award must be posted to the GPR.</p>
6.3.1. Purchase Order	<p>Added:</p> <ul style="list-style-type: none"> • Reference to SAO Policy regarding when purchase orders should be used and provided link to the policy: http://sao.georgia.gov/sites/sao.georgia.gov/files/related_files/site_page/PO%20Policy%20050114%20FINAL.pdf • All PO line descriptions must clearly identify what is being purchased (using invoice, manufacturer, or item number alone are not acceptable). • For Team Georgia Marketplace™ users, Purchase Orders should be executed in the system and contain all of the above listed criteria. When utilizing a statewide contract or state entity contract for a purchase, each purchase order line should reflect the contract number whether the purchase is sourced from a catalog or not. • Following these specific instructions on Purchase Orders will ensure accurate data is captured in entity procurement spend reports.
6.3.1.1. Commodity Codes	<p>Modified:</p> <ul style="list-style-type: none"> • <i>Commodity codes</i> are used to identify commodities and/or services being purchased and these purchases must be coded with the applicable NIGP Code™ regardless of the dollar amount. • Every purchase order line item must be coded accurately with a five-digit (Class) NIGP Code™ selected from the correct three-digit (Category) Code.
6.3.1.2. Purchase Type Codes	<p>Changed in Table 6.6:</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<ul style="list-style-type: none"> • Exempt Purchase Type (EXM) – added Section 1.2.4. • Multiple Purchase Order Type (MUL) - The state entity’s issuance of a single PO to a single supplier to purchase a combination of Purchase Type items. Some examples include: OMP (less than \$25,000) and SWCM OMP (less than \$25,000) and SWCC OMP (less than \$25,000) and AC OMP (less than \$25,000) and MAN (GEPS mandatory) OMP (less than \$25,000) and Exempt Contact processimprovement@doas.ga.gov for questions concerning acceptable purchase combinations for use of the MUL code. • Modified note below Table: Use of the "MUL" code is intended to introduce work efficiencies by allowing a single purchase order to be issued to a single supplier for a combination of purchases as shown in the examples in the table above. The "MUL" code is available for use by all state entities • For all PeopleSoft users making a purchase from a SWC or AC when the MUL code is used, the contract number must be entered at the PO line.
6.4. Step 3 - Supplier Reviews Posted Results	<p>Added Rejection Options to Table 6.7 for Price Match on RFQs:</p> <ul style="list-style-type: none"> • GRB (Georgia Resident Business) - Supplier’s lowest price was matched by a Georgia Resident Business • Price Match SB (Small Business) - Supplier’s lowest price was matched by a Small Business • GRSB (Georgia Resident Small Business) – Supplier’s lowest price was matched by a Georgia Resident Small Business
6.5.1. Types of Challenges	<p>Added:</p> <p>Challenge to a Consortia/Cooperative Notice: Any aggrieved supplier interested in and capable of providing the goods/services identified in a</p>

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	consortia/cooperative notice may file a protest challenging the consortia or cooperative notice determination.
6.5.4. Filing Deadlines	Revised protest filing periods in Table 6.9 to align with the \$25,000 Competitive Bid Threshold, and reduced filing periods based on amount of bid (see attached document <i>SPD-SP014 Checklist for Bid Posting Times and Protest Filings</i> for specific details)
6.5.5. Stay of Procurement During Protest Review	<ul style="list-style-type: none"> • Changed when a challenge to the competitive bidding process is timely filed, it must be filed: <ul style="list-style-type: none"> ○ one day before the closing date and time if the solicitation is under \$250,000; or ○ two days before the closing date and time if the solicitation is \$250,000 or greater • Added: When a protest is timely filed challenging a consortium or cooperative purchase notice, the state entity will not proceed to actual contract award unless the State Purchasing Division Deputy Commissioner makes a written determination that the issuance of a contract or performance of the contract without delay is necessary to protect the interests of the state.
6.5.8. Requests for Formal Review/Appeal Process	<p>Added:</p> <p>All protests decisions concerning solicitations, sole-source notices, consortia or cooperative purchase notices, and/or intended/actual contract awards with an estimated value at \$100,000.00 or more will be subject to formal review by the DOAS Commissioner upon request.</p>
Chapter 7: Stage 7 – Contract Process	
Key Steps	Added new forms to Table 7.1: SPD-CP012 Contract Administrative Change Template
7.6.1.1. Administrative Change	Added use of new form, SPD-CP912 Contract Administrative Change Template, for making administrative changes to contracts.

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

7.6.2. Contract Renewals	<p>Changed Table 7.5, Step 7</p> <ul style="list-style-type: none"> • Deleted reference to State Purchasing’s form: SPD-SP054
7.6.4. Assignment and Delegation	<ul style="list-style-type: none"> • Deleted reference to State Purchasing’s form: SPD-SP054 • Changed reference to Department of Audits and Accounts Immigration and Security Form • Provided link to Department of Audits and Accounts web site for locating the Immigration and Security Form: http://www.audits.ga.gov/NALGAD/section_3_affidavits.html
Chapter: Operational	
Key Steps	Removed form from Table 8.1: SPD-OP010 Entity Organizational Information
8.1.1. State Entity Procurement Spend	Changed the deadline to February 15 for APO/CUPO to submit the annual self-audit and spend report.
8.2.1. APO/CUPO Responsibilities	<ul style="list-style-type: none"> • Bullet for <i>Providing an annual self-audit and spend analysis report to SPD</i> - modified to state that four (4) quarterly self-audit results can be submitted annually in lieu of one annual report. • Bullet for <i>Notifying SPD of Staff Changes by submitting SPD-OP10 Entity Organizational Form</i> – omitted form requirement and modified to state the APO/CUPO must update this information on the Georgia Procurement Registry Agency Information with Procurement Staff site.
8.4.1. Certification Programs	<p>Added requirements to Table 8.3 - Georgia Certified Purchasing Manager (GCPM) Certification:</p> <ul style="list-style-type: none"> • Employee must complete GCPA Basic Certification prior to pursuing GCPM status • RFP Negotiation Certificate - All employees are not required to take this course for GCPM Certification. APOs/CUPOs alone will have the authority to conduct Negotiations on behalf of the State Entity and will be required to complete this

**Revised GPM Policy Supplement #04-15 - GPM Changes
Effective July 1, 2015**

Note: Changes or additions to this document since the May webinars were hosted are highlighted below.

	<p>course.</p> <p>Added new Deadlines in Table 8.4 for completing the Georgia Certified Purchasing Manager (GCPM) Certification:</p> <ul style="list-style-type: none"> • For APOs/CUPOs: <ul style="list-style-type: none"> ○ Within six months of completing RFP Certificate ○ RFP training classes included in the RFP Certificate must be completed and Negotiations Certificate received prior to negotiation of any RFP which identifies the APO/CUPO as the Negotiating Party for the State Entity. • For all other procurement professionals... <ul style="list-style-type: none"> ○ Within the deadline established by the APO/CUPO except that the RFP training classes included in the RFP Certificate must be completed prior to the posting of an RFP which identifies the procurement professional as the RFP issuing officer. ○ APOs/CUPOs alone will have the authority to conduct Negotiations on behalf of the State Entity. <p>To request an exception, contact SPD via email at processimprovement@doas.ga.gov.</p>
8.4.2. Training Registration	<p>Added: Contact Training@doas.ga.gov in order to acquire access to the LMS (Learning Management System)</p>
8.6.1. Retention of Procurement Records	<p>Changed:</p> <ul style="list-style-type: none"> • Georgia Records Act to O.C.G.A. 50-16-92. • Manage records according to procedures and regulations issued by the Department of Archives and History of the University System of Georgia • Link to the State’s Retention Schedules: http://www.georgiaarchives.org/records/retention_schedules