

VILLAGE OF FRIENDSHIP HEIGHTS

VILLAGE COUNCIL

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Village of Friendship Heights Acquisitions Policy

1. PURPOSE AND SCOPE

This policy establishes guidelines and procedures for the acquisition of goods, services, and construction by the Village of Friendship Heights to ensure fiscal responsibility, transparency, fair competition, and compliance with applicable laws.

2. GENERAL PRINCIPLES

Except as provided in Paragraph 6, all acquisitions shall be conducted in a manner that:

- Ensures fair and open competition
- Promotes the best value for taxpayer dollars
- Maintains integrity and transparency in all transactions
- Prevents conflicts of interest and favoritism
- Complies with all federal, state, and local requirements

3. ROLES AND RESPONSIBILITIES

3.1 Village Manager responsibilities include overseeing all procurement activities, including:

- 3.1.1 Planning and needs assessment
 - Identify Village needs and prepare specifications
 - Ensure budget availability before initiating purchases
 - Issue requests for goods or services with adequate lead time
- 3.1.2 Procurement execution:
 - Coordinate competitive bidding and RFP processes
 - Approve purchases within designated authority limits
 - Review and recommend contracts to the Village Council
- 3.1.3. Compliance and controls:
 - Ensure compliance with this policy
 - Ensure adequate internal controls
 - Ensure legal review of contracts prior to agreement or presentation before Council

- o Ensure payments are within the scope of contracts
- o Ensure re-bidding of contracts every 3 years, or as appropriate
- o Ensure periodic review of all vendors for cost and performance

3.1.4. Vendor and records management:

- o Maintain and expand vendor lists and records for each type of service
- o Maintain electronic file with vendor contracts and proof of insurance
- o Maintain current documentation of required insurance for all vendors with active contracts
- o Evaluate vendor performance

3.2 Village Council responsibilities:

- o Approve purchases exceeding \$20,000 over the contract term
- o Award contracts as required by policy
- o Review and modify procurement policies as appropriate

4. PURCHASING AUTHORITY AND THRESHOLDS

4.1 Direct Purchase (Under \$20,000)

- o Authorization: Village Manager approval
- o Requirements:
 - Must obtain best price reasonably available
 - Verbal or written quotes recommended for purchases up to \$20,000
 - Minimum of three (3) written quotes desired for purchases over 20,000
 - Document vendor selection rationale

4.2 Formal Bids (\$20,000-\$100,000)

- o Authorization: Village Council
- o Requirements:
 - Formal Request for Proposals (RFP)
- o Minimum three (3) bids
 - Award to lowest responsive and responsible bidder, unless a documented justification is provided to the Council
 - Written contract required

5. REQUEST FOR PROPOSALS (RFP) PROCESS

5.1 When to Use RFPs

- o RFPs shall be used when:
 - Purchase exceeds \$20,000 but may be used for lower value purchases
 - Evaluation may consider multiple factors beyond cost

5.2 RFP Development

- o Each RFP shall include:
 - Consultation with technical experts prior to drafting RFP, when relevant
 - Statement that “The specifications contained in this RFP describe one approach to accomplishing the stated objectives. Proposers are encouraged to suggest

alternative methods or approaches they believe would better achieve those objectives. Alternative approaches will be evaluated on equal footing with the specified approach, provided the proposer demonstrates how the alternative meets the project's goals.”

- Project background and scope of work
- Detailed specifications and deliverables
- Submission requirements and format
- Evaluation criteria and weighting
- Proposed contract terms and conditions
- Submission deadline and contact information
- Insurance and bonding requirements
- Required licenses and qualifications

5.3 RFP Advertisement

- o Publish notice on the Village website
- o Direct notification to known qualified vendors
- o Minimum 15-day response period (30 days recommended for complex projects)

5.4 Pre-Proposal Conference

- o Recommended for large or complex acquisitions:
 - Provide opportunity for vendor questions
 - Issue written addenda for all clarifications
 - Do not provide individual advantages

5.5 Proposal Evaluation

- o Use predetermined scoring criteria
- o Evaluate based on published criteria
- o Document evaluation process and scores
- o Village Manager recommends award to Village Council or to the Committee as appropriate

5.6 Award Process

- o Present recommendation to Council
- o Execute formal contract upon approval and legal review

6. EXCEPTIONS TO COMPETITIVE BIDDING

6.1 Emergency Purchases

- o Immediate necessity to protect public health, safety, or property
- o Requires written determination by Village Manager
- o Document circumstances and vendor selection

6.2 Sole Source Purchases

- o Permissible only when:
 - A single source is available for required item/service
 - Proprietary or patented item with no acceptable substitute is needed
 - Compatibility with existing equipment/systems required or as an add-on to an existing professional services contract

- o Requirements:
 - Written justification by Village Manager, including documentation of market research
 - Approval by Village Manager (under \$5,000) or Village Council (> \$5,000)

6.3 Piggyback Contracts

- o Village may utilize contracts competitively bid by:
 - State or federal government agencies
 - Other municipalities or governmental cooperatives
 - Regional purchasing
- o Consortiums Requirements:
 - Verify contract allows Village participation
 - Confirm pricing and terms
 - Document basis for piggyback use
 - Standard approval thresholds apply

6.4 Professional Services

- o Legal, engineering, architectural, medical, or other licensed professional services
- o Emphasis on qualifications over price alone
- o RFP process recommended but not always required

6.5 Further exemptions:

- o The following are exempt from competitive bidding requirements:
 - Utility services (water, sewer, electricity, gas, telephone)
 - Real property acquisitions
 - Intergovernmental agreements
 - Insurance policies (separate procurement rules may apply)
 - Dues, memberships, subscriptions
 - Training and conference registration fees

7. CONFLICT OF INTEREST

7.1 All employees and Councilmembers shall comply with the Village's Ethics Policy.
Adopted 1/12/26

7.2 Prohibited Activities

- o No Village employee or Councilmember shall:
 - Have financial interest in vendor doing business with the Village
 - Accept gifts, gratuities, or favors from vendors exceeding \$25
 - Participate in evaluation or award involving conflict of interest
 - Disclose confidential bid or proposal information

8. CONTRACT ADMINISTRATION

8.1 Contract Requirements

- o All purchases of goods or services over \$5,000 shall include:

- Written contract or approved proposal
- Detailed scope of work/specifications
- Price and payment terms
- Performance period
- Insurance and indemnification provisions
- Termination provisions
- Compliance with applicable laws, regulations, and policies
- Assurance and documentation that all required permits are obtained before work commences

8.2 Contract Changes

- o For contracts over \$20,000:
 - Change orders under 10% of contract value and no material change to the contract or service: Village Manager approval
 - Change orders over 10% of contract value: Village Council notified prior to Village Manager approval

8.3 Performance Monitoring

- o Designated staff monitor contractor performance
- o Document issues and resolution
- o Maintain vendor performance records
- o Use performance history in future evaluations

9. RECORDS RETENTION

All procurement records, including bids, proposals, and contracts, purchase orders and invoices, vendor correspondence, and change orders shall be maintained in compliance with the Village's Record's Retention policy.

10. POLICY COMPLIANCE AND VIOLATIONS

10.1 Training

- o All personnel involved in procurement shall receive training on this policy.

10.2 Violations

- o Violations of this policy by Village personnel may result in:
 - Disciplinary action up to and including termination
 - Referral for legal action if appropriate
 - Contract cancellation

10.3 Policy Review

- o This policy shall be reviewed annually and updated as needed.

Approved by the Village Council on April 13, 2026.