



CITY OF HALLANDALE BEACH  
PIGGYBACK AND/OR CO-OP  
DEPARTMENT REQUEST FOR APPROVAL CERTIFICATION

The Procurement Department is providing the COHB Piggyback and/or Coop Department Request for Approval Certification Form which must be used to procure an item and/or service that has been competitively solicited by another entity (piggyback and/or coop). Follow the process outlined below which will assist departments in meeting all procurement requirements for the approval of the use of the piggyback and/or coop contracts.

It is desirable to have the Piggyback Form routed for approval prior to requisition or agenda item entry. If the Piggyback Form is submitted at time of entering a requisition or agenda item with information missing the form will be returned to requesting Department for updates which may cause a delay in the approval process. Agenda item must match piggyback information in its entirety. Completed Piggyback Forms can be submitted for review and signature via email.

**Step One:** Contact Other Entity (government or coop or other where the piggyback contract is from) and obtain:

1. a copy of the COMPLETE fully executed contract that you want to use (known as "Source Contract"),
2. a copy of the solicitation (bid or RFP) that was issued for that awarded contract and its scope/services,
3. a copy of the proposal that was submitted by the awarded vendor that was awarded the contract, and
4. a copy of the resolution awarding that contract.

**Step Two:** Contact awarded Vendor and obtain a cost proposal. You must ensure that the awarded Vendor is aware that the cost proposal provided to COHB must be consistent and match the pricing of the awarded contract (contract you wish to piggyback). Lump sum contracts where a single price is quoted for an entire project based on plans, specifications, services, other cannot be piggybacked unless you are purchasing 100% the exact same items/services.

The cost proposal must be in the vendor's letterhead and/or show vendor's business information (address, phone, etc.), and must state:

- a. the name of the city the piggyback is from
- b. the name and # of the awarded contract (piggyback contract) from where the pricing is coming from.

**Step Three:** Requesting Department Project Manager and/or authorized staff must compare the COHB Cost Proposal provided by the awarded vendor to the piggyback Source Contract and make sure every single price matches 100%.

**Step Four:** Obtain written authorization from Other Entity Purchasing Department to Piggyback such entities' contract. This must be an email that is provided with this form to Procurement Department.

**Step Five:** Fill out the COHB Piggyback and/or Coop Department Request for Approval Certification Form (this Form). You will need to provide all the documents requested and ensure 100% of Step Three above is done.

**Step Six:** Submit to Procurement Department for review. This form must be provided to the Procurement Department at least 3 business days prior to need of a response.

**Step Seven:** If approved by Procurement, determine the proper Contract Method you will utilize for the purchase. This must be discussed with the Department Director.

The options are as follows:

OPTION A: Purchase Order. Purchase Order is to be used for routine purchases when items of purchases are unknown, for example Office Depot and Home Depot. A purchase order will always be required for a purchase.

OPTION B: Written COHB Form Agreement (which has already been approved by City Attorney). It is required that the Department Director address the use of the COHB Form Agreement with requesting department staff to determine if the City's Form Agreement is also going to be processed in addition to the Purchase Order. The Project Manager and Department Director must make this determination to ensure that the City's best interest for the project is addressed as necessary in the City's Form Agreement. In such review staff needs to address if the transaction/purchase has terms dates, deliverables, and milestones to determine if the COHB Form Agreement is to be processed in addition to the purchase order in order to protect a smooth project completion. It is recommended that all services and construction projects/purchases/transactions be processed with a COHB Form Agreement in addition to the purchase order.

**Step Eight:** Request in a timely manner the appropriate insurance requirement to Risk Manager. The Certificate of Insurance approved by Risk Manager for the purchase must be loaded to Munis for request of the requisition.

**Step Nine:** After the Procurement Department has provided approval of the piggyback contract you may have to submit an ISR to City Attorney to Draft and/or review COHB Form Contract that will be utilized for the purchase.

**Step Ten:** Submit through agenda process for commission approval if commission approval is required. City Manager thresholds vary depending on what you are purchasing. Remember that the expenditure with 1 vendor is added together throughout the City by all the departments that have already purchased through the same vendor. This dictates whether Commission approval is required or not. Review vendor's expenditures in Munis to make this determination. If commission approval is not required enter the requisition, COHB piggyback/coop certification form approved by the Procurement Department, and all the documentation that such form requires in Munis TCM.

**SECTION I**

**INFORMATION ABOUT PIGGYBACK AND/OR COOP CONTRACT**

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| Contract Title name and # you wish to piggyback:             |  |
| Name of entity that awarded the contract:                    |  |
| Name of Proposed Vendor piggyback contract was awarded to:   |  |
| Date of Award of contract:                                   |  |
| Date of contract expiration (term of contract to piggyback): |  |
| Date of last renewal term:                                   |  |
| Renewals left (how many):                                    |  |

**VENDOR INFORMATION FOR PIGGYBACK AND/OR COOP CONTRACT**

|                                     |  |
|-------------------------------------|--|
| Vendor Name:                        |  |
| Vendor Email:                       |  |
| Vendor contact first and last name: |  |
| Vendor Address:                     |  |
| Vendor Phone #:                     |  |

**DESCRIPTION OF WHAT PIGGYBACK INCLUDES (PLEASE COMPLETE EACH CATEGORY AS NECESSARY)**

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| Purchase of items/services:              |
| Repair of what items:                    |
| Maintenance of what items:               |
| Lease of what items and length of lease: |
| Other:                                   |

| THE FOLLOWING LISTED BELOW MUST BE PROVIDED TO PROCUREMENT WHEN REQUESTING APPROVAL TO UTILIZE PIGGYBACK AND/OR COOP CONTRACT.  | PLEASE COMPLETE BOXES OF ITEMS TO ATTACH: |
|---|---|
| <p>1.) Provide a copy of <u>formal solicitation</u> user department wishes to piggyback (copy of RFP, Bid, Other). You must highlight the scope that applies to all the items that the purchase is for.</p> <p><b>Procurement Department Notes:</b></p>   |   |
| <p>2.) Copy of <u>proposal</u> provided by the awarded firm in response to the formal solicitation which your Department wishes to piggyback. You must highlight the scope that applies for all items you will purchase through this request.</p> <p><b>Procurement Department Notes:</b></p>   |   |
| <p>3.) Copy of the <u>Resolution</u> for award of contract from entity (city/town/other) for the piggyback/coop contract. You must highlight the scope that applies to the purchase you are requesting.</p> <p><b>Procurement Department Notes:</b></p>   |   |
| <p>4.) Copy of the fully executed <u>agreement</u> from entity (City/Town/Other) piggyback/coop is from. You must highlight the scope that applies to the purchase you are requesting. If the agreement does not detail the scope, technical specifications, and items you wish to use from piggyback/coop contract you must provide documents from entity that details and shows this information.</p> <p><b>Procurement Department Notes:</b></p> |   |
| <p>5.) Copy of Awarded Vendor's <u>Sunbiz</u>:</p> <p><b>Procurement Department Notes:</b></p>  |   |

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| <p>6.) Provide a copy of the <u>cost proposal</u> from the vendor that identifies the page #s, line items, and section #s where the price offered by the awarded vendor correlates and matches to the source contract. The cost proposal from the vendor must state the source contract title and contract #.</p> <p><b>The Department <u>must</u> verify this information prior to submission of the form for approval.</b></p> <p><b>Procurement Department Notes:</b></p>   |  |
| <p>7.) Provide the email from the purchasing Department from piggyback/coop Entity (City/Town/Other) authorizing use of the piggyback/coop awarded contract:</p> <p><b>Procurement Department Notes:</b></p>   |  |
| <p>8.) a. Provide the Total Piggyback contract Price (you must include all costs that are part of the entire project). This could be an excel sheet and/or any type of document that identifies and states the project name and #, and the piggyback contract name and #.</p> <p>b. If the piggyback is for a multiyear project or lease, please provide a total for both, one single Fiscal Year and the total length of the agreement.</p> <p>c. Contract being piggybacked must state that it allows for a multiyear term with a predetermined price and detailed information for each year for the length of the agreement.</p> <p>d. If applicable, you must also specify any work, scope that is <u>not</u> in the piggyback agreement and how the user department plans to proceed with such purchases to meet and adhere to the procurement process.</p> <p><b>Requesting Department Notes:</b></p> <p>The Innovation Technology Department is requesting the purchase of computer hardware, software and other peripherals from CDWG for the operations of the department in an annual estimated not to exceed amount of \$237,100 per fiscal year for a term of three (3) years in order to facilitate the acquisition of technology related purchases necessary to run the department from September 30, 2022 until the end of the OMNIA contract on February 28, 2025.</p> <p><b>Procurement Department Notes:</b></p> | <p>Purchase:</p> <p>Repair:</p> <p>Maintenance:</p> <p>Lease:</p> <p>Other:</p> <p>One Single FY Total:</p> <p>Total for entire project:</p> |
| <p>9.) Provide the project number associated with the piggyback/coop, if applicable.</p>   |  |

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| <p>10.) Please note and be ready to address the following information with the awarded vendor after the Procurement Department provides approval of use of the piggyback/coop contract. Note: Any project expenditure for construction in excess of \$150,000 requires 100% performance and payment bond to be provided by the awarded firm to the user department prior to the start of the project. User Department and Project Manager will have to provide the 100% performance and payment bond to the Procurement Department certified by the county by attaching it to Munis TCM for the requisition to be processed. Yes, Department Director and Project Manager understand and have addressed with awarded vendor.</p> |  |
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I certify by signing below that:

1. I have accurately completed all the items and fields above and in this COHB Piggyback and/or Coop requesting Department Certification Form.
2. I have read the above stated awarded executed agreement.
3. I have read the above stated proposed awarded formal solicitation.
4. I have read the above stated contract terms and conditions.
5. I have read all pricing and items listed above and documents named in this form and I certify that all are in the City's best interest for the purchase of the project needed.
6. I have reviewed the pricing and find this contract to be the best value for the City of Hallandale Beach for the project.

Tristan Lattibeaudiere, CIO   
 \_\_\_\_\_  
 User requesting Department Director signature and print name

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Procurement Director print name and sign; and/or Procurement staff name that has reviewed this form for this request):

Date: \_\_\_\_\_

This form is approved by the Procurement Department: Yes \_\_\_\_\_ No \_\_\_\_\_

If the piggyback and/or coop contract is not approved state, why and who the denial was sent to and what date:

**SECTION II**

AFTER THE PROCUREMENT DEPARTMENT HAS PROVIDED APPROVAL TO THE DEPARTMENT THROUGH THE COHB PIGGYBACK AND/OR COOP DEPARTMENT REQUEST FOR APPROVAL CERTIFICATION FORM (SECTION I), THE REQUESTING DEPARTMENT WILL EITHER PROCEED TO ENTER THE REQUISITION IN MUNIS AND PROCESS THE COHB FORM AGREEMENT; OR THE DEPARTMENT WILL PROCEED TO REQUEST COMMISSION APPROVAL IF THE THRESHOLD FOR PURCHASE REQUIRES IT. THE FOLLOWING LISTED BELOW, AS WELL AS THE PROCUREMENT DEPARTMENT APPROVED FORM FROM SECTION I ABOVE, MUST BE PROVIDED TO THE PROCUREMENT DEPARTMENT THROUGH TCM IN MUNIS WHEN THE REQUISITION IS ENTERED. FORM SECTION I MUST ALSO BE ATTACHED IN GRANICUS FOR AGENDA APPROVAL OF THE PIGGYBACK/COOP CONTRACT, IF COMMISSION APPROVAL IS REQUIRED.

PLEASE COMPLETE BOXES OF ITEMS BEING PROVIDED:

1) COHB piggyback and/or coop department request for approval certification form approved by the Procurement Department (Form above all of Section I).

Procurement  
Department Notes:

2) Certificate of Insurance as required per contract, if applicable (Department must discuss insurance requirements with Risk Manager). Department is to process the insurance approval as required). If this request is approved, make sure the insurance is approved by the Risk Manager. If Risk Manager is providing a waiver, such must be uploaded in Munis.

Procurement  
Department Notes:

3) COHB executed Resolution if thresholds for the project and the piggyback/coop exceed City Manager Authority.

Procurement  
Department Notes:

4) 100% performance and payment bond certified by the County, if it is a construction project that requires it, see statement above in Section I.

Procurement  
Department Notes: