



Date: 5/14/2026
To: BARB
From: Kalla Langston-Weiss, City Clerk
Subject: Planning and Budgeting for Projects Under the City Purchasing Policy

The purpose of this memo is to outline the recommended process for planning and budgeting for projects in accordance with the City of Buchanan Purchasing Policy. The policy is intended to ensure that City purchases are handled in a consistent, fair, transparent, and accountable manner.

When a project is being considered, the first step should be to examine the scope and estimated cost of the project. This includes identifying the proposed work, materials, services, equipment, labor, site needs, and any other related expenses. The group should also consider whether the project may require professional services, outside contractors, future maintenance, or additional phases.

Once the general scope and estimated cost have been identified, the project should be evaluated with the City Treasurer to determine whether funding is available within the current budget. This review should include whether the project is already budgeted, whether funds are available in the appropriate line item, whether a budget amendment may be needed, or whether the project should be considered as part of a future budget cycle.

After the budget review is complete, staff should determine which purchasing requirements apply under the City's Purchasing Policy. Purchases over \$1,000 are subject to competitive bidding unless an approved exception applies, and documentation must be maintained showing vendors contacted, bids received, and the final decision-making process. For purchases between \$1,000 and \$5,000, documentation should include the names of vendors contacted, a summary of bids submitted, the selected vendor, and the justification for the decision.

For projects estimated over \$5,000, a formal Request for Bids or Request for Proposals should be prepared and publicly published. The RFP should clearly describe the project scope, specifications, qualifications, deadlines, terms and conditions, and evaluation criteria. Before publication, the RFP should be reviewed and approved by the City Manager to confirm that the project is appropriate to proceed, that the purchasing process complies with City policy, and that the proposed scope aligns with available funding and City priorities.

Once the RFP has been approved by the City Manager, staff should provide a suggested update to the City Commission. This update should inform the Commission of the

proposed project, estimated cost, funding source or budget status, anticipated timeline, and the planned purchasing process. Providing this update before final award helps maintain transparency and ensures the Commission is aware of upcoming projects that may later require formal approval.

Any project or purchase exceeding \$5,000 must ultimately return to the City Commission for approval before award, unless an emergency exception applies. The Commission should be provided with the RFP, bid summary, evaluation information, staff recommendation, and confirmation of available funding.

In summary, the recommended process is:

1. Develop the project scope and estimated cost.
2. If the project was budgeted and planned for, review the project with the City Treasurer to confirm budget availability.
3. If funding is not available in the current budget, the board should prepare a report outlining the request for City Commission consideration in the next fiscal year budget. This report should be submitted to city staff by February 28.
4. Determine the applicable purchasing requirements.
5. Prepare the RFP, if required. This step will be completed by City staff.
6. Obtain City Manager approval before issuing the RFP.
7. Provide a project update to the City Commission.
8. Return to the City Commission for final approval if the project exceeds \$5,000.

Following this process will help ensure that projects are properly scoped, budgeted, reviewed, and approved before the City commits funds or begins work.