



**City of Waukesha**  
201 Delafield Street  
Waukesha, WI 53188  
Tel: 262.542.3700  
waukesha-wi.gov

## City of Waukesha Cover Sheet

<b>Committee:</b> Finance Committee	<b>Meeting Date:</b> 08/11/2025
<b>ID Number:</b> ID#25-02014	<b>Ordinance/Resolution Number (if applicable):</b> N/A
<b>Name of Submitter:</b> Anthony W. Brown & Joseph Ciurro	<b>Target Next Board/Council Meeting Date:</b> 08/18/2025
<b>Agenda Item Title:</b> Review and Act on revised Financial Policy, F-6.0 Purchasing and Bidding, as presented.	

### Issue Before the Board/Council:

It has been a number of years since the existing purchasing and bidding policy has been reviewed or revised. As noted as an objective in the City's 2024-2029 Strategic Plan, all financial policies are to be reviewed by December 31, 2026. In response, City Administration determined that it was appropriate to start reviewing this policy, given its impact on all City Departments. The proposed revisions focus on definitions of the roles throughout the City for procurement, types of purchases and the criteria for purchase approvals.

### Options & Alternatives:

Option 1: Approve the revised Financial Policy, F-6.0 Purchasing and Bidding, as proposed.  
Option 2: Reject and either request further revisions or leave policy as is.

### Additional Details:

The proposed changes include:

- Defining the difference between the procurement of Public Construction and other goods and services.
- Changing procurement thresholds for Non-Public Construction as follows:
  - From \$25,000 to \$75,000; Items over \$75,000 would be procured following a RFP/RFQ process and require Council approval.
  - From \$5,000 to \$25,000 to \$10,000 to \$75,000; Items greater than \$10,000 and less than or equal to \$75,000 would require 3-informal quotes. If the total cost of the purchase does not exceed the budget line-item amount, purchase can be administratively approved or contract executed through City Administration.
  - From \$5,000 to \$10,000; Items less than or equal to \$10,000 would be procured at the discretion of the responsible department director, or designated purchasing official and if the item does not exceed the budget line-item, would be approved administratively.
- Defining various procurement methods (RFP, RFQ, RFI, Sole Source, State Contract pricing, etc.)

### UPDATES BASED ON AUGUST 12<sup>TH</sup> FINANCE COMMITTEE MEETING:

- Public Construction. Since there is a piece of legislation at the State-level to increase the purchasing thresholds for Public Construction the language was modified from \$25,000 to also include the following language: "or the current limit stated in Wis. Stat. §62.15 or any successor provision. See Section 6.6.1 and 6.6.2 (page 4).



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- **Fleet Purchase.** Fleet Purchases are an exception. If the item is authorized in the City budget and does not exceed the line-item amount, the Mayor or City Administrator is allowed to execute the contract. See Section 6.7.1 (page 4).

Beyond the two items discussed at the Finance Committee meeting, there were other straightforward modifications to make the Policy clearer. For instance, a few roles and responsibilities were clarified, along with some definitions, the procurement method language was refined and definitions were moved to be ahead of Roles and Responsibilities.

Two other modifications worth mentioning:

- **Professional Services.** The professional services section was eliminated because it already falls within the purchasing thresholds for Purchases Not Related to Public Construction and did not need to be called out. See Section 6.7.4 in the redlined version (page 5).
- **Emergencies.** The Emergencies section was rewritten to 6.9 Exceptions to Policy Requirements (page 7).

If this Policy is adopted, the Finance Department will then create a procedures document to operationalize it at a Staff-level.

**What is the Strategic Plan Priority this item relates to:**

Financial Sustainability

**What impact will this item have on the Strategic Plan Priority?**

All financial policies need to be reviewed and revised by December 31, 2026.

**Financial Remarks:**

The Finance Director recommends the revisions note to the Purchasing and Bidding policy.

**Suggested Motion:**

**Move to Approve revised Financial Policy, F-6.0 Purchasing and Bidding, as presented.**

**Reviewed By:**

<b>Finance Director</b> Joseph P. Ciorro	<b>Date Reviewed</b> 08/06/2025
<b>City Attorney</b> Brian Running	<b>Date Reviewed</b> 08/08/2025
<b>City Administrator</b> Anthony Brown	<b>Date Reviewed</b> 08/08/2025