

Instructions for Completing the Certificate of Exemption

The gray areas are the sections for the user to input information. Users can make changes to the gray areas only. The document is protected to retain formatting and information required for exemption requests.

Follow the instructions below to complete the Certificate of Exemption:

1. Insert the date, using **mm/dd/yyyy** format.
2. Provide your **department name**.
3. Select the appropriate **Exemption** using the radio dials. Left click on the dial to select the exemption. (If unsure, please contact your Procurement Specialist).
4. **Describe the event** or events which necessitate the exemption. Provide specific, qualified information which supports the need for the exemption. (Refer to example below for this step and the next two.) The gray is limited to approximately **600 characters**.
5. Provide the **vendor name** your department is recommending for the procurement and the approximate **cost** for the procurement.
6. The user then provides **signature** in the appropriate line and obtains the Originating Department Director signature, prior to forwarding to Finance.

Please refer to your Shared Services Procurement Specialist or assigned Central Buyer for the commodity with questions or assistance in completing this form.

Example of Text Area

Be sure to complete this section with detailed information which supports the exemption request.

This Certificate of Exemption is executed and filed with the Finance Department as follows:

1. The undersigned is authorized to approve an exemption.
2. An exemption according to Section 252.022 of the Local Government Code exists. More following event has occurred.
3. Because the exemption stated above exists, the City of San Antonio intends to contract with _____ which will cost approximately \$ _____.

Insert text in these areas. Text is limited to approximately 600 characters.

FINANCE DEPARTMENT
Certificate of Exemption Form

Date:

Originating Department:

The City is authorized under limited conditions to make procurements outside of the competitive solicitation process. Chapter 252 of the Local Government Code provides guidance regarding sixteen general exemptions from the competitive solicitation. Please select one exemption.

a procurement made because of a public calamity that requires funds to relieve the needs of the residents or to preserve city property

a procurement to preserve or protect the public health or safety of the city's residents

a procurement necessary because of unforeseen damage to machinery, equipment or other property

a procurement for personal, professional or planning services

a procurement for work that is performed and paid for by the day as the work progresses

a purchase of land or right-of-way

a procurement of items available from only one source

a purchase of rare books, papers and other materials for a public library

paving, drainage, street widening and other public improvements or related matter where at least one-third of the costs are paid by special assessments

a public improvement project which has been authorized but for which there is deficiency of funds to complete in accordance with the plans as authorized

a payment under a contract by which a developer participates in the construction of a public improvement as provided by subchap. c, ch 212.

personal property sold

services performed by blind or severely disabled persons

goods purchased by a municipality for subsequent retail sale by the municipality

electricity

advertising, other than legal notices

This Certificate of Exemption is executed and filed with the Finance Department as follows:

1. The undersigned is authorized to approve an exemption.
2. An exemption according to Section 252.022 of the Local Government Code exists. More specifically, the following event has occurred:

3. Because the exemption stated above exists, the City of San Antonio intends to contract with _____ which will cost approximately \$ _____.

Originator

Jennifer Johnson

Procurement Administrator Approval

Department Director Approval

City Manager

(approval required only for ratification by City Council)