

BOARD OF COUNTY COMMISSIONERS
COLUMBIA COUNTY, FLORIDA
PURCHASING POLICIES AND PROCEDURES

Revised 3/20/14

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SECTION 300 INTRODUCTION

300.1 INTRODUCTION:

This manual is for use by all agencies under the budgetary control of the Columbia County Board of County Commissioners. This manual was prepared by the Purchasing Department to establish and communicate uniform operating policies and procedures, for the procurement of materials, goods, services, construction, and equipment. This Manual is intended to help the departments understand the system, duties and responsibilities of both the Purchasing Department and the user agencies in the procurement process, and to provide a foundation for effective, consistent and complete consideration of all aspects of the procurement task.

The Purchasing Department will take the lead in an attitude of cooperation with vendors and other County Departments to hold the lowest cost and best quality needed to meet the job requirement, always keeping in mind that our primary goal is to obtain **“the most value for the Taxpayers dollar.”**

SECTION 301 DUTIES AND RESPONSIBILITIES

301.1 ORGANIZATION:

The Purchasing Department, under the Purchasing Director, reports directly to the County Coordinator or his designee.

301.2 RESPONSIBILITIES AND FUNCTIONS:

301.2.1 The Purchasing Department, under the Purchasing Director, is responsible for developing and administering purchasing policies, processing bids, consolidating purchases of like or common items, analyzing prices paid for equipment, supplies, and services, and generally defining how to obtain savings and to coordinate purchasing and contracting procedures. The Purchasing Director is charged with the responsibility of insuring that all purchases comply with County Purchasing Policy. The Purchasing Director has commitment and signature authority for purchase orders in amounts up to **\$20,000**. The County Coordinator must approve purchases over **\$20,000**.

301.2.2 Specific functions include but are not limited to:

301.2.2.1 Develop purchasing objectives, policies, programs and procedures for the acquisition of equipment, commodities, supplies, construction, professional services, and disposal of surplus material.

- 301.2.2.2 Coordinate purchasing procedures with other departments and County officers.
- 301.2.2.3 Act as the County Coordinator's representative on matters pertaining to purchasing.
- 301.2.2.4 Assist in preparing specifications for equipment, supplies and services.
- 301.2.2.5 Prepare bid documents for sealed bid requirements and submit advertisements for publication.
- 301.2.2.6 Attend bid openings of all sealed bids and tabulate the results of the bid proposals received.
- 301.2.2.7 Transmit bid proposals to the applicable department head or staff director for evaluation, review evaluations and make recommendations for bid award to the Board.
- 301.2.2.8 Provide the County Coordinator with written recommendations for bid awards that require Board approval three (3) working days prior to regularly scheduled Board meetings. Attach copies of each department head or staff recommendations as back up. Coordinate any rebuttal of recommendations made, consulting with the County Coordinator prior to finalizing bid award recommendations.
- 301.2.2.9 Consolidate purchases of like or common items to obtain maximum economical benefits.
- 301.2.2.10 Arrange for the disposal of surplus supplies and equipment. (See Section 308 on Surplus and Obsolete Property.)
- 301.2.2.11 Work with other departments to promote goodwill between the County and its suppliers.
- 301.2.2.12 Prepare and submit annual operating budgets for the Purchasing Department.
- 301.2.2.13 Coordinate with Property Control the acquisition of all equipment \$500.00 and over in value.
- 301.2.2.14 Maintain updated mailing lists for suppliers of goods and services.

- 301.2.2.15 Establish and provide guidelines for the acquisition of outside services such as Construction, Maintenance or Professional Services.
- 301.2.2.16 Establish and provide guidelines for the acquisition of short-term rental or long term-leased equipment.

301.3 ADMINISTRATIVE POLICIES:

- 301.3.1 The Purchasing Department has full authority to question the quality, quantity, and kind of items requisitioned in order that the best interests of the County may be served. No changes, however, will be made without first notifying the ordering department.
- 301.3.2 All vendors must be offered equal specifications and opportunity to submit bids and/or quotations if they are to compete on equal terms.
- 301.3.3 The County will buy only from suppliers who have adequate financial strength (i.e. companies that have not filed bankruptcy or do not have excessive liens, etc.), and a record of adhering to specifications, maintaining shipping promises, or giving a full measure of service. The Purchasing Department shall buy at the lowest and best cost consistent with the quality needed to meet the requirements of the County. New sources of supply will be given consideration, as multiple sources of supply are necessary to insure availability of materials. The County does not discriminate regardless of race, religion, nationality, or gender in the bidding and award process for contracts and commodities.
- 301.3.4 The County strives to maintain strong and enduring relationships with vendors and suppliers of proven ability and those who desire to meet its needs. To accomplish this, purchasing activities will be conducted so that sources of supply being used will place a high value on County business and make every effort to meet these requirements on the basis of quality, service and price.
- 301.3.5 Cooperation and understanding between departments is essential to the effective operation of the purchasing system. Close liaison must be established between Departments and the Purchasing Department in order to maintain an effective, efficient and economical purchasing system.

301.3.6 The preparation of specifications for technical equipment, plan or designs is the responsibility of the requesting departments (the specifier). However, the Purchasing Department shall provide assistance when requested or needed. No specifications shall be changed or modified by the Purchasing Department without coordination with the requesting department. Departments should submit specifications on the requisition or on an attached sheet with the appropriate justification and cost account code.

301.4 PURCHASING DEPARTMENT ETHICS:

301.4.1 Acceptance of gifts at any time must comply with Florida Statutes. Employees must not become obligated to any suppliers and shall not conclude any county transaction from which they may personally benefit.

301.4.2 No County officer or employee shall bid for, enter into, or be in any manner interested in any contract for County purchases or County public works, except as provided for by F.S. 839.091, nor shall any officer or employee seek to influence the purchase of a product or service from any bidder; except this restriction shall not be construed to restrict persons from evaluating and appraising the quality and value of the product to be purchased or service to be rendered where the person's scope of employment contemplates advice and council with respect to the purchase.

SECTION 302
PURCHASING PROCEDURES FOR ORDERING

302.1 QUOTATIONS:

- 302.1.1 The requester will obtain at least three (3) competitive quotations, whenever possible. Purchase items under \$500.00 are exempt from obtaining competitive verbal quotations except as circumstances may require. Sole Source items are also exempt, however, if it is the opinion of the Purchasing Director that written documentation confirming this condition is required, it shall be the responsibility of the requester to obtain such documentation. Other circumstances creating an inability to secure multiple quotations shall be documented on the individual requisition and will be filed with the purchase order. When sealed bids are requested and no proposals are received, it will be the decision of the Board of County Commissioners to either re-bid or accept a supplier as recommended by the Purchasing Department.
- 302.1.2 As outlined below, the Purchasing Director or requester may solicit either oral or written quotations from the open market and shall make use of available current vendors' and suppliers' price lists.
- 302.1.2.1 When requesting quotations for items costing up to **\$2,500.00**, three verbal quotations shall be sufficient; however, a supplier may be required to provide a written quote depending on the complexity of the requirement.
- 302.1.2.2 Quotations for items in excess of **\$2,500.00** and up to **\$25,000.00** must be in writing and appear on the bidders letterhead or company invoice stating that it is a quote. Under urgent conditions requiring immediate ordering action to fill department requirements, quotations may be solicited orally then followed up with a written request for quotation from the supplier.
- 302.1.2.3 In all the above situations, it is important that each supplier be provided with identical specifications.
- 302.1.2.4 If at least three quotations are not possible, the Purchasing Director or requester will make a notation on the requisition stating reasons for inability to obtain sufficient quotes. All suppliers stating no quote will be documented.

302.2 SEALED BIDS:

- 302.2.1 All requests for purchases or contracts except as provided below, when the sum is in excess of the bid limit (**\$25,000.00**), shall be advertised for sealed bids. The Board of County Commissioners approval is required for Sealed Bid awards.
- 302.2.2 All items necessitating sealed bidding for departments under the jurisdiction of the Board of County Commissioners must submit to the Purchasing Department a requisition with specifications attached. With this information Purchasing will prepare a Bid Package and provide a bid opening time and date.
- 302.2.3 The Purchasing Director will coordinate the appropriate bid opening time and date and submit to the local newspaper or specialized publication for legal advertisement.
- 302.2.4 Exceptions to sealed bid and award method include the following:
 - 302.2.4.1 Emergency Purchases as provided in Section 310 of the Purchasing Policies.
 - 302.2.4.2 Repairs to Existing Equipment - When accompanied by a memo stating only one firm can or should repair the equipment approved by:
\$3,000 or less - Purchasing Director
\$3,000 or more - County Coordinator or designee
The Board of County Commissioners will be notified of any award in excess of \$25,000.00.
 - 302.2.4.3 Sole-Source Purchases as provided in Section 311 of the Purchasing Policies.
 - 302.2.4.4 All purchases of services from a utility provider whose rates are determined and controlled by the Public Service Commission or other governmental authority.
 - 302.2.4.5 All supplies, materials, equipment or services purchased at a price established by the State of Florida purchasing agency, or at a price equal to or less than the price established by the state agency.
 - 302.2.4.6 All supplies, materials, equipment or services purchased from another governmental unit.

302.2.4.7(a) All Purchases of real property having a value of twenty thousand dollars (\$20,000) or; less however each such purchase shall be supported by an opinion of value from the Property Appraiser's Office or an independent appraisal report.

302.2.4.7(b) All Purchases of real property having a value greater than twenty thousand dollars (\$20,000) and up to and including two hundred thousand dollars (\$200,000); however each such purchase shall be supported by two independent appraisal reports. An opinion of value from the Property Appraiser's Office may substitute for one appraisal.

302.2.4.7(c) All Purchases of real property having a value greater than two hundred thousand dollars (\$200,000); however each such purchase shall be supported by two independent appraisal reports prepared by different appraisers.

302.2.4.8 STORMWATER MITIGATION
PROPERTY ACQUISITION GUIDELINES

It is often necessary for Columbia County to purchase property in order to complete stormwater mitigation projects essential to insuring the health, safety and welfare of its citizens. In order to ensure that stormwater mitigation property purchases are fair and equitable for all citizens and that the stormwater mitigation property acquisition process is completed in the most cost effective and timely manner possible, the following stormwater mitigation property acquisition guidelines are recommended:

1. The laws of the State of Florida and the policies of Columbia County will govern stormwater mitigation purchases.
2. Grant funded projects shall comply with all grant requirements. When grant requirements are in conflict with these guidelines, the grant requirements shall prevail.
3. Property to be considered for stormwater mitigation projects shall be of benefit to a geographical area, stormwater basin or meet the requirements of a specific project. Purchases of stormwater mitigation property which benefit a singular property or owner are not to be considered.

4. Acceptable appraisals include appraisals established by private appraisers and by the Columbia County Property Appraiser.
5. The Board of County Commissioners has the right to refuse any and/or all appraisals with or without cause.
6. It is the intent of Columbia County to pay no more than the lowest appraisal of any and/or all appraisals for stormwater mitigation property purchases. Acknowledging that unique circumstances can and do occur, it is the intent of Columbia County to only consider offers above the lowest appraised price when the offer can be demonstrated to be in the public's best interest.
7. All purchase Agreements must be approved by the Board.
8. Title will be transferred to the County by Statutory Warranty Deed free of all liens and encumbrances except those such as standard deed restrictions that may be acceptable to the county.
9. Unless otherwise negotiated in the purchase price, Seller will pay documentary stamps on the deed, Owners title insurance in the amount of the purchase price, and clear any title defects. County will provide its own survey and recording of the deed. These are the standard closing costs, but are subject to negotiation in determining the purchase price.

302.2.4.9

RIGHT-OF-WAY ACQUISITION GUIDELINES

In order to ensure that right-of-way purchases in Columbia County are fair and equitable for all citizens and that the right-of-way acquisition process is completed in the most cost effective and timely manner possible, the following right-of-way acquisition guidelines are recommended:

1. The Operations Manager, County Engineer and the County Commissioners in which the right-of-way will be acquired will meet to discuss the project. The purpose of the meeting will be to discuss any known or expected issues and strategies for mitigating such issues.
2. The County Engineer will provide instruction to the County Surveyor and authorize the establishment of a center line and the identification of the proposed right-of-way limits.

3. The County Engineer will cause notice of the proposed work to be mailed to each affected property owner.
4. Upon completion of the centerline and right-of-way survey, the Operations Manager, County Engineer, the County Commissioner in which the right-of-way is being acquired and the County Attorney will meet. The purpose of this meeting is to make any final changes to the limits of the right-of-way to be acquired.
5. The County Engineer will authorize the County Surveyor to complete the right-of-way survey complete with property boundaries and legal descriptions. The legal descriptions shall include the acreage amount, the gross right-of-way (currently maintained and owned by the County plus additional right-of-way to be acquired) and acreage for additional right-of-way acquired.
6. The County Engineer shall contact entities providing utility services in existing right-of-way or additional right-of-way and determine what, if any, utility easements need to be acquired by the County at the time of property acquisition.
7. Upon completion of the final survey, including property boundaries and legal descriptions, the Operations Manager, County Engineer and County Attorney shall decide which parcels will require a title search. The County Attorney will order all needed and necessary title searches.
8. Upon completion of all title searches, the Operations Manager, County Engineer and County Attorney shall group all parcels to be acquired into one of four categories:
 - (a) no appraisal needed;
 - (b) to be acquired utilizing values determined by the County Property Appraiser;
 - (c) to be acquired utilizing a value determined by a limited (restricted) summary appraisal report; and
 - (d) to be acquired utilizing a value determined by a full appraisal report, including land and improvements taken, damage to remainder (severance) or other compensable damages or costs to cure.

NOTE: At this time the decision will be made regarding the

necessity of obtaining partial releases of mortgage or other liens encumbering the property.

9. The County Engineer and County Attorney shall meet with the County Acquisition Agent and review parcels contained within Categories 8 (a) and (b). Specific guidelines and authorization to make an offer shall be given to the County Acquisition Agent.
10. Category 8 (a) and (b) purchases shall be negotiated using values determined by paragraph 8, together with its cost of fence replacement and other improvements, tree allowance, and appraisal cost avoidance.
11. County Engineer and County Attorney shall order appraisals for parcels contained within Categories 8 (c) and (d) where paragraph 10 settlement negotiations fail.
12. Upon completion of the appraisal ordered for Category (c) and (d) acquisitions, the County Engineer, County Attorney and the individual(s) who completed the appraisal shall meet with the County Acquisition Agent and review each appraisal. Specific guidelines and authorization to make an offer shall be given to the County Acquisition Agent.
13. The County Acquisition Agent shall report to the County Engineer and County Attorney on the status of acquisitions assigned in each category. Agreements between the County Acquisition Agent and the property owners shall be memorialized with an “Agreement to Purchase” prepared by the County Attorney.
14. Upon review and approval of the “Agreement to Purchase” by the County Attorney, the agreement shall be forwarded to the designated closing agent for purchase, and approval of the Agreement by the Board of County Commissioners where necessary.
15. Parcels the County Acquisition Agent is unable to reach agreement on shall be remanded to the County Attorney for further action, including written offer to owner, eminent domain resolution from the Board, and eminent domain Petition and Order of Taking.
16. Procedure for release of Mortgage or other liens against the property:

(a) A request for a partial release of mortgage or other lien against the property will be sent to the mortgagee or other lien holder at least fourteen (14) days prior to closing. If no partial release of the mortgage or lien has been obtained within said 14 days, then the settlement or closing agent shall proceed in accordance with the guidelines below.

(b) No release of mortgage shall be required when the time and expense of obtaining such release jeopardizes or significantly impairs the roadway project, except a release of mortgage shall be required when:

(1) The County's appraisal shows damage to the remainder of the property.

(2) The mortgage is known to be in default or a foreclosure action is pending in the courts.

(3) The appraisal value of the property taken exceeds \$5,000.

(4) When in the judgment of the settlement agent or county manager the facts and circumstances of the acquisition mandate obtaining a release of the mortgage.

(c) All final judgments which constitute a valid lien against the property will be released or included in the eminent domain proceedings.

302.2.4.10 All purchases of used equipment having a value of twenty thousand dollars (\$20,000) or less; however each such purchase shall be supported by one (1) independent appraisal report.

302.2.4.11 All purchases of used equipment having a value greater than twenty thousand dollars (\$20,000); however each such purchase shall be supported by two (2) independent appraisal reports.

302.2.4.12 Materials, goods, services, construction or equipment purchased under an annual or other time contract awarded by the Board of County Commissioners.

302.2.4.13 Services of a professional nature, including engineering, land surveying, architectural, and landscape architectural services

controlled by purchasing policy Section 307, and artistic services, academic program reviews, lectures Section 287.055 Florida Statutes, and medical and legal services.

- 302.2.4.14 Purchases of supplies, materials, equipment and services under contract or previous bid with federal, state, county, or municipal government or any other governmental agency or political subdivision providing the vendor extends the same terms and conditions of the contract to the County, based on the determination by the Purchasing Director of such purchases being in the best interest of the County.
- 302.2.4.15 Small construction projects as provided in Section 312 of the Purchasing policies.
- 302.2.4.16 Asphalt purchases, including installation, when estimated by the County Engineer or Public Works Director to be equal to or less than Twenty thousand dollars (\$20,000) in value, may be acquired under the annualized asphalt bid.

302.3 REQUISITIONING AND PURCHASING PROCEDURES:

- 302.3.1 Requisitioning Procedures. All departments or agencies under the Board of County Commissioners shall obtain equipment, supplies, and services by forwarding a requisition to the Purchasing Department, with exception that purchases for **\$250.00** and under may be made using the manual purchases order form. (See Exhibit A)

The requisition should be submitted far enough in advance of the requirements for the items to permit the Purchasing Department to review and obtain additional competitive prices, when determined to be necessary, and to allow sufficient time for deliveries to be made.

Time required normally for delivery of item(s) after receipt of requisition and correct specifications by the Purchasing Department is dependent on availability of materials and whether the sealed bid process must be used. The sealed bid process alone will take at least five (5) weeks or more, plus the lead-time required by the supplier to provide the item(s) requested.

Purchase Order Number: If department is purchasing item(s), a purchase order must be obtained from the Purchasing Department or his designee before ordering with the exception of purchases under **\$250**.

If the department is ordering the items, under no circumstances are items to be picked up by a department before the issuance of a purchase order number. After the fact issuing of purchase orders will not be condoned.

The following is a checklist in preparation of the requisition:

302.3.1.1 Supplier's Name & Address: Enter supplier's Vendor Code. Recommended sources of supply will be noted on the requisition to assist the buyer in expediting the purchase of the department's requirements.

Sole source requirements must be fully justifiable and noted on requisition by the department head or designee.

302.3.1.2 Ship To: Enter complete street address where item is to be shipped, or designate if department is to pick up.

302.3.1.3 Bill to: Provide bill to address for the Department ordering as per format:

Columbia County Board of Commissioners
Department Name
Street Address
Lake City, Florida & Zip Code

302.3.1.4 Quantity: Self-explanatory.

302.3.1.5 Unit: This indicates how the product is to be purchased, EA (each), BL (barrel), LB (pounds), GL (gallon), etc. When in doubt, contact the Purchasing Department.

302.3.1.6 Unit Price: Whenever possible the unit cost will be obtained from the supplier.

302.3.1.7 Accounting Detail: Enter the correct charge account number for which the items or service will be used from your department budget chart of accounts. The Department head or designee will be responsible for posting the correct account number to which the item(s) will be charged.

302.3.1.8 The recap of telephone quotes or written quotes should be forwarded with requisition.

302.4 FUND AUTHORIZATION:

302.4.1 Requisitions must state from which budget account encumbrances will be made and may not be submitted when funds are not available. If funds are not available, it will be the responsibility of the department head to rectify the situation by submission of a Budget Amendment with the approval of the County Commissioners.

302.5 RECEIPT OF GOODS AND SERVICES:

- 302.5.1 The department for accuracy, quantity, quality, and condition must check any equipment, supplies, or services, which go directly to the ordering department. Only after this has been accomplished should a delivery ticket, invoice or receiving report be signed. All problems with the shipment will be noted on the receiving document and carrier's waybill before it is signed and returned to the driver delivering the items. If in doubt, always contact the Purchasing Department on how to proceed in cases with problem shipments.
- 302.5.2 Packing slips, freight waybills, and any other receiving documents will be stapled together, dated, signed by the receiver and sent to the Finance Department for further processing. Do not retain the above documents in your file if order was not shipped complete.
- 302.5.3 To avoid delays in payment of invoices, be sure that the person authorized to sign invoices, normally the department head or his designated representative, signs all invoices and designates appropriate account number as approval for payment before they are sent to the Finance Department for processing.
- 302.5.4 When signing for services performed, sign only for what was actually performed. Never sign blank invoices or service tickets. Always insist that your department receive a copy of the service/delivery ticket for the work performed.
- 302.5.5 If items received are damaged or defective, the department receiving the goods should not use the items and immediately notify the vendor for the corrective action. If the department and vendor need further assistance in correcting the problem, contact the Purchasing Department for assistance.
- 302.5.6 Core Deposits/Tank or Drum Deposits - It will be the responsibility of the department receiving the items to return or track the core, tank or drum deposit items for credit from the suppliers
- 302.5.7 When the purchase order is completed. The Department will close out the purchase order and send the invoice to the Finance Department for payment.

The history of the purchase order will indicate the date, invoice number and processed amount.

302.6 BLANKET PURCHASE ORDERS:

- 302.6.1 As a rule, the use of blanket purchase orders will be restricted to purchases in the following categories:
 - 302.6.1.1 Items for which there is an established contract.
 - 302.6.1.2 Small repair or replacement items used on a repetitive basis. Authorization will be at the discretion of the Purchasing Director and the Department Head.
 - 302.6.1.3 Any item(s) which, at the discretion of the Purchasing Director, do not lend themselves readily to acquisition by small purchase or normal requisitions procedures.
- 302.6.2 The purchasing department, in coordination with the requisitioning department, will establish a dollar limit for each blanket purchase order.
- 302.6.3 The invoice for the materials received, when purchasing items on a blanket purchase order, will be signed by the person authorized to sign invoices along with account number & PO number and forwarded to the Finance Department within 72 hours after receipt. The department may retain a duplicate copy of the invoice for posting amount to the blanket order log and for filing in the completed order file.
- 302.6.4 The department will request in writing the requirements for blanket purchase orders thirty (30) days prior to the end of the fiscal year. The department will be requested to submit in writing the continuance or termination of the blanket purchase orders.

302.7 PURCHASE ORDER FOLLOW-UP:

- 302.7.1 Departments initiating requisitions should keep track of all requisitions and coordinate with the Purchasing Department to insure requisitions have been received and are valid. It is important that special conditions, such as time deadlines, be noted on the requisition so that items can be received by the required date.
- 302.7.2 The function of the Purchasing Department is to supply equipment, supplies or services to fulfill staff and departmental requirements. This function is not complete until satisfactory delivery of such items has been made. Follow-up of outstanding purchase orders is made as follows:

- 302.7.2.1 The Purchasing Department will provide the status of an open purchase order upon being notified by the ordering department that item(s) on the purchase order are past due or needed before the indicated required date.

- 302.7.2.2 The Purchasing Department will either write or telephone the vendor requesting specific reasons as to why delivery has not been made as confirmed. A new, realistic delivery date will be established if the vendor has a bona fide reason of delay. If not, the order is subject to cancellation. The ordering department will then be notified to either accept the delayed delivery date or authorize the buyer to cancel the order.

- 302.7.2.3 Continued broken promises and/or poor service shall result in the Purchasing Director evaluating such performance to determine if the vendor should be removed from the bid and quotation lists.

302.8 CANCELING OF PURCHASE ORDERS:

- 302.8.1 When a department determines that an order is to be canceled, the Purchasing Department must be notified. The reason for the cancellation of the order will be provided in writing by the department to the buyer.

- 302.8.2 The County may cancel the order verbally. The action must then be confirmed to the supplier in writing.

302.9 PUBLIC ENTITY CRIMES:

No person or company on the Florida State Division of Hearings of the Department of Administration convicted vendors list may submit a bid in accordance with F.S. 287.133.

SECTION 303 CONTRACTS

303.1 GENERAL:

This section deals with the Purchasing Department's policy to consolidate commodity requirements, whenever possible, in the interest of effecting cost savings to the county. Upon consolidation, the commodity will be bid to obtain the best possible price and of the quality to satisfy the departments requirements. The resulting contract after bid award will provide a stable price for at least a year and will further provide savings in the time spent by personnel in obtaining quotes and generation of paperwork.

303.1.1 In coordination with the using departments, the Purchasing Department will consolidate purchasing of any item or items to obtain a quantity bid price. The specifications of the item(s) will be prepared by the using Department Head and reviewed with the Purchasing Director. The Purchasing Director will prepare the bid documents and forward it for review and approval by the using Department Head.

303.1.2 The Purchasing Director is responsible to insure proper coordination within the County Administrative Staff.

303.1.3 The Internal Auditor will review all bid documents for fiscal feasibility that will result in contractual obligations.

303.1.4 After the bid has been awarded to the bidder, the Purchasing Director will prepare a "Letter of Award" with instructions relating to providing the necessary documents and executions of same prior to issuing a Contract Release Purchase Order or Notice to Proceed.

303.1.5 After the execution of the contract by the supplier, the Purchasing Director, County Coordinator, or his designee will sign on behalf of the County. The County attorney will approve all contracts prior to execution.

303.1.6 Contracts will be monitored by the Purchasing Director or his designee to assure compliance by the Vendor/Supplier of their contractual obligations.

303.2 USUAL TYPES OF CONTRACTS AND ORDERS:

303.2.1 **ONE TIME** - This type of contract or purchase order is for a one-time buy of a set amount of equipment, supplies and/or services and terminates upon final receipt of items or acceptance of the completed service or facility.

- 303.2.2 SOLE SOURCE - This type of contract or purchase order is to a designated vendor without competitive bids or quotations for specific equipment, supplies or services that cannot be provided by any other vendor. The requesting division or department head will provide complete justification for a sole source purchase.
- 303.2.3 BLANKET PURCHASE ORDER - Blanket purchase orders shall be issued for a given period and shall be for a definite amount of funds.
- 303.2.4 ANNUAL CONTRACT - Awards are in effect normally for a one (1) year period. Standing delivery orders are usually placed with the vendor for a fixed amount either daily, weekly, or monthly, or by contract release order.
- 303.2.5 OPEN-END CONTRACT - An annual contract where the quantity may be more or less than the estimated quantity specified. Actual consumption may fall below or exceed estimated quantity. Payment is made to the vendor based on deliveries.
- 303.2.6 EMERGENCY PURCHASE- The necessity for the immediate purchase of supplies or services essential to protect the life, health, or safety of the public, or the urgency of a situation or construction schedule mandates the fastest possible delivery and such delivery could be jeopardized by the time required for formal competitive bidding. The department head and Purchasing Director, or County Coordinator, or designee must approve an emergency purchase.

303.3 CONTRACT PREPARATION:

Contracts must be so constructed as to protect the County against undefined obligations that may be inherent in the bid documents. To provide for safeguards to the County, the contract will have as a minimum the conditions listed below and be approved by the County attorney:

COMMODITY CONTRACTS:

- 303.3.1 All contracts will identify the date of the contract, the Owner (County), the vendor and a description of the commodities to be provided.
- 303.3.2 The number of days initially provided in the bid documents to complete the term of the contract when providing commodities.
- 303.3.3 The amount of the bid.
- 303.3.4 A Termination Clause that provides the time limit for the contract. Also, state if the contract can be extended for a period of one year or more.
- 303.3.5 Various signatures required executing the contract.

303.4 CONSTRUCTION OR MAINTENANCE CONTRACTS:

A requisition should be prepared when a service is needed that cannot be provided by county maintenance staff. The requisition needs to be reviewed and approved by the Purchasing Department BEFORE the low bid or selected contractor orders material or arrives on site to begin work. True emergencies are an exception.

No one is authorized to sign agreements for commodities or services except for Purchasing Staff, Assistant County Coordinators or the County Coordinator. A request by a contractor or vendor to sign his contract form should be referred to the Purchasing Department.

303.4.1 The following are minimum requirements that generally apply to contracts for outside services. Additional procedures or information may be obtained by calling the Purchasing Department.

Scope Statement:

The scope should be in writing and typed entirely on the purchase order or attached to the purchase order and referenced by title, drawing number, etc. A scope that references “by verbal instructions of...” is normally unacceptable.

Contract Schedule:

ASAP is unacceptable. Specific time frames should be used when possible. The time schedule can be addressed by using statements similar to the ones shown below:

Work under this contract shall begin as of _____ and must be complete not later than _____ .

Time frame for contract completion is a maximum of _____ Calendar days. Contract start date is unknown. Name at phone number, will advise.

Anticipated month for project to begin/end is Month/year. Name at phone number will coordinate time frames with the contractor.

Method of Payment (Most common):

Lump Sum Firm
Time and Material
Unit Price

Insurance:

Comprehensive General Liability
Automobile Insurance

SECTION 304
SPECIFICATIONS, BIDS AND AWARDS

304.1 PURPOSE OF SPECIFICATIONS:

Technical specifications are designed to assist the Purchasing Department and requisitioning department in acquiring the items required to satisfy a requirement and to insure that the quality and service will fulfill these requirements for which the equipment, supplies or services are intended. Non-technical terminology deals with contract language, legal terms, provisions, bid documents, etc.

304.2 RESPONSIBILITY FOR SPECIFICATIONS:

304.2.1 The Purchasing Department is responsible for maintaining copies of all current specifications established by the department or as developed by Purchasing.

304.2.2 Preparation of technical specifications for new equipment, supplies or services is the responsibility of the requesting division or department in coordination with the Purchasing Director. Non-technical specifications are the responsibility of the Purchasing Department.

304.2.3 The Purchasing Director may make recommended modifications or alterations to the specifications to accommodate competitive bidding. The Purchasing Director will then furnish the requesting division or department a report of the changes recommended and why changes are desired. Should the Purchasing Director and requesting department fail to resolve the differences, the specifications will be referred to the County Coordinator for resolution. A copy of the specifications in final form will be signed and dated by the department head indicating that the bid form and specifications as prepared are satisfactory.

304.3 SPECIFICATIONS DEVELOPMENT:

304.3.1 In considering and developing specifications, it must always be remembered that expenditures are derived from public sources and are administered by public bodies, which cannot be expected to provide for unwarranted high levels of quality. Therefore, the general policy of purchasing good standard grades of merchandise that will represent an optimum of quality, price and provide a satisfactory level of service will be considered.

304.3.2 Bids and quotations should be based on concise specifications. Specifications should be composed of features and designs that will satisfy the requirements of the department in getting the job done in a manner most advantageous to the County. When the specifier (department head) for equipment or material that must have those certain specifications establishes specifications, the words "or equal" will be used after the specification title. It will be the responsibility of the bidder to convince the specifier that their product is equal for the intended use of the item on a particular requirement or project.

304.3.3 The following guidance is provided to the departments for the preparation of a specification:

304.3.3.1 State exactly what is wanted clearly, definitely and completely. Be prepared to provide back-up information that will substantiate your requirement for all items of your specifications.

304.3.3.2 Provide the means or basis for insuring that deliveries conform to the specifications. Without this check, the specifications lose much of their force as a purchasing tool.

304.3.3.3 Avoid non-essential quality restrictions that add to cost and difficulty in procurement without adding to utility and value.

304.3.3.4 Avoid specific requirements that will restrict competition.

304.3.3.5 Conform, so far as possible, to established standard commercial and industrial specifications.

304.3.3.6 Request assistance from the Purchasing Director.

304.3.4 Once a decision has been reached on the specifications, all bids being evaluated must be based upon these same specifications and no bidder has a right to substitute other specifications or provide alternate items for those contained in the bid.

304.4 BID DEVELOPMENT:

304.4.1 Bid Invitation. The formal sealed bid advertisement or letter of Request for Quotation (RFQ) mailed to prospective bidders on the Purchasing Department mailing lists is the means for publicly notifying prospective vendors of the need for equipment, materials, construction, and/or services that the County intends to order.

304.4.2 Formal sealed bid invitations will normally be conveyed to interested vendors by advertising the bid in a local newspaper and by mailing advertisement to Vendors/Suppliers from vendor lists. Any other means available may be used by the Purchasing Department to insure the widest possible distribution of invitations to bid.

304.4.3 Legal Notice-Advertisement for Bids. An advertisement will be placed once each week for at least two weeks prior to the bid opening date, in a local newspaper of general circulation, except for specialized advertising of bids, announcing the bid invitation to insure all interested vendors not on file in the Purchasing Department receive the opportunity for submitting a bid. The advertisement will contain a general description of the equipment, supplies, or services to be procured, state where County bid forms and specifications may be obtained, time and date of bid opening and other information as needed in the bid requirements.

Bid documents should not be made available to prospective bidders before the publishing of the legal notice.

304.4.4 The Purchasing Department will maintain a "Bidders List" of vendors who desire to receive bid invitations by U.S. Mail. A prospective bidder will complete the County's standard "Request to be placed on bidder's list form".

304.4.5 The Purchasing Department is responsible for evaluation of all vendors requesting permission to submit bids to the County. Evaluation should be completed prior to an award. The Purchasing Department Representative may visit all new vendors at their physical location to familiarize themselves with the conditions of the new vendors operation.

304.4.6 The Purchasing Director will endeavor to insure that only bids from responsible vendors are considered.

304.5 DISQUALIFICATION (DEBARMENT) OF BIDDERS:

304.5.1 The Purchasing Director shall review cases where probable cause for disqualification exists. The review by the Purchasing Director will consist of information from the affected department and from the vendor/contractor. The County Coordinator must ratify any Debarment.

304.5.2 Causes for Disqualification:

304.5.2.1 Vendor defaults or fails to fully comply with the conditions, specifications, or terms of a bid, quotation, proposal or contract with the County; or

- 304.5.2.2 Vendor commits any fraud or misrepresentation in connection with a bid, quotation proposal or contract with the County; or
- 304.5.2.3 Vendor is charged by a court of competent jurisdiction with the commission of a criminal offense as an incident to obtaining or attempting to obtain a public or private contract or subcontract, or in the performance of such contract or subcontract; or
- 304.5.2.4 Vendor is charged by a court of competent jurisdiction with the following; embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty which currently, seriously, and directly affects the responsibility as a County Government Contractor.

If charges are dismissed or the Vendor found not guilty, the suspension shall be lifted automatically upon written notification and proof of final court disposition provided by the Vendor to the County; or
- 304.5.2.5 Vendor becomes insolvent, has proceedings in bankruptcy instituted against it or, compounds its debts or assigns over its estate or effects for payment thereof, or has a receiver or trustee appointed over its property; or
- 304.5.2.6 Vendor commission or any act or omission to perform any act which is grounds for disqualification; or
- 304.5.2.7 Vendor violates the ethical standards set forth in local, State or Federal law; or
- 304.5.2.8 Any other cause the Purchasing Director determines to be so serious and compelling as to materially and adversely affect responsibility of a Business as a County Government Contractor, including but not limited to suspension by another governmental entity for substantial cause.

304.5.3

Disqualification:

A vendor may be permanently disqualified for the following:

- 304.5.3.1 Default or failure to fully comply with the conditions, specifications, drawings, or terms of a bid, proposal or contract with the County twice in any three-year period.

304.5.3.2 Conviction by or judgment obtained in a court of competent jurisdiction for commission of those offenses in connection with the Vendor's commercial enterprise stated previously in this section. If the conviction or judgment is reversed through the appellate process, the disqualification shall be removed immediately upon written notification and proof of final court disposition from the Vendor to the County.

304.5.4 Decision:
After the Purchasing Director has determined he/she has cause to suspend or disqualify a vendor, and the action has been ratified by the County Coordinator, the Purchasing Director shall notify the Vendor in writing of the disqualification for the period of suspension and the reasons for the action taken.

304.5.5 Public Entity Crime:
Any Vendor who has been convicted of a "Public Entity Crime" (F.S. 287.133), shall not be able to transact business with the County to the extent as specified in F.S. 287.133(3)(a).

304.5.6 Finality of Decision:
The suspension or disqualification shall be final and conclusive unless the suspended or disqualified vendor initiates protest proceedings.

304.6 PROCESSING OF FORMAL SEALED BIDS:

304.6.1 On the time and date specified in the Notice to Bidders, the Purchasing Department will open the sealed bids, in the location as stated in the advertisement for bids. The Purchasing Director will approve tabulation of the bids.

Bids will normally be opened at the location, time and date as specified in the advertisement "NOTICE TO BIDDERS".

304.6.2 The Purchasing Director at time of bid opening will insure a person authorized to sign such documents for the bidder has properly signed bids. Unsigned bids may be rejected.

304.6.3 The bids will be reviewed and evaluated by the applicable department head and his technical assistants, copies of the bids will be transmitted to the department. The department head recommendations for bid award to the Board will be communicated to the Purchasing Director.

After evaluation of all the bids are completed, a recommendation will be prepared by the Purchasing Director for presentation to the Board, by the County Manager, based on the Department Head's recommendations of the vendor or supplier to receive the bid award. During evaluation the bid in the County's best interest shall be accepted; however, the availability of service and equipment is to be considered in such determination.

The general policy of the Board is to award the purchase or contract to the lowest bidder; however, other contributing factors may justify awarding to a higher or more responsible bidder. Other contributing factors include, but are not limited to, the following:

- (a) life cycle or total cost bidding;
- (b) exceeding minimum specifications at a relatively minor cost which would better benefit the County;
- (c) prior history with the County, including favorable contracts, commodities, or services, and residence and place of business of contractor, subcontractors, and suppliers. Except where otherwise provided by federal or state law or other funding source restrictions, in purchasing or letting contracts for procurement of personal property, materials, construction services for improvements to real property, including roadways or existing structures, the County shall give preference to a LOCAL BUSINESS in the following manner:

Under a competitive bid solicitation, when the lowest responsive and responsible bid is submitted by an individual, firm or entity that is not a LOCAL BUSINESS, then the LOCAL BUSINESS that submitted the otherwise lowest responsive and responsible bid shall be offered an award of the bid if that LOCAL BUSINESS' bid was not greater than five percent (5%) of the otherwise lowest responsive and responsible bid amount and does not exceed said lowest bid amount by \$250,000.00.

A LOCAL BUSINESS shall mean an individual entity whose primary residence is within Columbia County; a partnership entity where at least one of its principals is a resident of Columbia County; and a Florida corporation entity or other business entity whose principal place of business is within Columbia County, or which maintains a full-time business office open to the public within Columbia County, Florida, and at least one of its officers or directors or shareholders is a resident of Columbia County, Florida.

In determining whether an entity is a LOCAL BUSINESS of Columbia County, the following factors shall be taken into consideration:

- (1) Is the principal place of business of the business entity within Columbia County, Florida?
- (2) Does the business entity maintain a full-time business office open to the public within Columbia County?
- (3) Has the entity maintained an office or place of business in Columbia County for the last past three (3) years?
- (4) Does the entity own real property located in Columbia County?
- (5) Has the business entity paid ad valorem taxes in Columbia County within the past three (3) years?
- (6) Has the business entity filed and paid a personal property tax in Columbia County during the current or last calendar year?
- (7) Is Columbia County the registered address of any of the business entity vehicles?

In the event two (2) or more LOCAL BUSINESS bidders qualify for local bid preference and are not the overall low bidders, the local preference shall be granted to the lowest LOCAL BUSINESS. With these and other contributing factors, the Board of County Commissioners reserves the right to award a bid which would be in the best interest of the County.

APPROVED by the Board of County Commissioners of Columbia County, Florida, on January 20, 2011.

304.6.4 If the Purchasing Director and department head are unable to determine the lowest and best bid, or there is some controversy concerning the bid, either party may submit the bids to the County Coordinator to select and recommend the lowest and best bid.

304.6.5 After a bid has been opened, a bidder will not be permitted to withdraw or alter their bid, or any bid deposit that may have been requested with their bid. If, however, circumstances warrant the apparent lowest and best bidder may notify the Purchasing Director that an error has been made in their bid, the Purchasing Director will present the matter, with recommendations, to the County Coordinator.

The matter may be presented to the Board of County Commissioners for final approval. If withdrawal is approved, the next lowest and best bid may be accepted.

- 304.6.6 In the event two (2) or more vendors have submitted the lowest and best bids, preference may be given in the award of the bid in the following order:
- 304.6.6.1 Preference will be given to vendors who are residents of Columbia County to vendors from adjacent counties.
 - 304.6.6.2 Preference will be given to vendors with drug-free workplace programs. (F.S. 287.087).
 - 304.6.6.3 Bid shall be awarded by lot.
- 304.6.7 After approval of the bid award by the Board of County Commissioners, the successful bidder will be notified. The normal means of notification is by Mail, Letter of Award, or by purchase order, however, when the bid is awarded near the expiration date of the bidder's allowable time for withdrawal of Bids, as stated in the advertisement for Bids, the Purchasing Department will notify the successful bidder of the award by the most expeditious and practical means available and follow up with a Letter of Award noting therein that the bidder was advised previously of his bid award.
- 304.6.8 The date the Board of County Commissioners approves the award shall constitute the date of acceptance of the bid proposal regardless of the date of notification of bid awarded to the successful bidder. Board approval constitutes authority for the Purchasing Department to issue a Purchase Order or Contract.

304.7 EVALUATION OF DEVIATIONS AND METHODS OF AWARD:

- 304.7.1 Only bids from responsive bidders are to be considered. A responsible bidder is one who has submitted a bid, which conforms in all material respects to the bid specifications and requirements in the Official County Bid Proposal Form.
- 304.7.2 Deviations in bids may be either material or immaterial and minor in nature and may be waived, dependent on the change in context created by deviation.
- 304.7.3 Material deviations may not be waived in order to make an award. Material deviations are those that go to the substance of the bid. This deviation affects the price, quality, characteristics of the item or delivery of the materials or services offered and are detrimental to the rights of other bidders. Illustrative examples include:
- 304.7.3.1 Minimum specifications are not met, as with required horsepower for an engine in a truck.

- 304.7.3.2 Type of item asked for is not being furnished, as with the type of pump needed in a water plant.
- 304.7.3.3 Where price is not filled in or is subject to change at a future time during the contract period.
- 304.7.3.4 When specific requirements in the bid documents are not reflected in the bidder proposal.
- 304.7.4 Immaterial or minor deviations may be waived and are those that will not alter a bidder's position with respect to receiving the award. These deviations may be clarified with the bidder or bidders if required to allow the County to understand what it will be receiving. Illustrative examples included:
 - 304.7.4.1 Failure to provide a certificate of affidavit with the bid.
 - 304.7.4.2 Failure to submit required proof of financial responsibility with the bid.
 - 304.7.4.3 Failure to submit requested brochures or catalogs with the bid.
- 304.7.5 An award will be made to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the bid documents. A cost analysis or a price analysis, as appropriate, shall be conducted prior to award of bids.
- 304.7.6 Bids may not be withdrawn for the time period as specified in the "Notice to Bidders" in the specifications.
- 304.8 BID PROTEST PROCEDURE:
 - 304.8.1 Any bidder opposed to an intended decision on any bid award must file with the Purchasing Director of Columbia County a written notice of intent to file a protest, **no later than seventy-two (72) hours (excluding Saturdays, Sundays and legal holidays), after the posting of the bid tabulation.** The initial notice of protest shall clearly state it is a bid protest, shall include the bid number, shall state the basis of the protest, and shall be signed by the bidder. **Failure to state the basis of the protest shall be just cause for the protest to be rejected according to the bid protest procedure.**
 - 304.8.2 The written notice of intent to file a protest shall be filed with the Purchasing Director no later than four-thirty (4:30) P.M., of the second working day following the day of the bid opening.

- 304.8.3 Following the filing of the Protest Notice, the bidder must submit a formal, written bid protest within five (5) Columbia County workdays. The allotted time may be reduced, if necessary, to protect the health, safety, and welfare, or other such interest of Columbia County, with consideration given to the affected party. No changes or amendments to the formal written protest will be allowed after the five- (5) workday expiration date.
- 304.8.4 The formal written protest shall contain the following:
- 304.8.4.1 Columbia County bid number and description as advertised.
 - 304.8.4.2 Name and address of company or person filing the protest.
 - 304.8.4.3 Name and title of person submitting the protest. If other than the bidder, a letter from the bidder authorizing him/her to act on the bidder's behalf.
 - 304.8.4.4 A statement of disputed material facts. If there are no disputed material facts, the written formal protest must so state.
 - 304.8.4.5 A precise statement of the facts, rules, regulations, statutes, and constitutional provisions entitling the affected party to relief.
 - 304.8.4.6 A statement indicating the relief requested.
 - 304.8.4.7 Any other information material to the protest.
- 304.8.5 Upon receipt of the protest notice, the Purchasing Director will suspend the process or award of the bid until the protest is resolved unless circumstances require the award of the bid to protect the health, safety, and welfare of Columbia County. The Purchasing Director will attempt to resolve the protest in a fair and equitable manner and shall render a written decision to the protester. All Columbia County correspondence involving a bid protest should be sent by Certified Mail Return Receipt Requested. The protester may appeal the decision within five (5) business days after receipt of the written decision.

304.8.6 The appeal of the Purchasing Director's decision will be submitted to the County Coordinator for review. The County Coordinator may, after a review of the facts, render a decision or submit the facts for legal or Board of County Commissioners review. The decision of the County Coordinator or Board of County Commissioners, if County Coordinator submits the issue to the Board, shall be final. Any bidder adversely affected by this final decision may apply to the Circuit Court having jurisdiction in the County for judicial relief within thirty (30) days after rendition of the final decision. The proceedings in the Circuit Court shall be by Petition for Writ of Certiorari, which shall be governed by the Florida Rules of Appellate Procedure.

304.8.7 All bid solicitations (information to bidders) shall contain the following statement:

"Any bidder affected adversely by an intended decision with respect to the award of any bid, shall file with the Purchasing Department for Columbia County, a written notice of intent to file a protest not later than seventy-two (72) hours (excluding Saturdays, Sundays and legal holidays), after the posting of the bid tabulation. Protest procedures may be obtained in the Purchasing Department."

SECTION 305
BONDS AND DEPOSITS

305.1 GENERAL:

Bid Bonds and Public Construction bonds may be waived by the County Coordinator on projects being bid whose dollar value is estimated to be \$200,000 or less. Waiver of a bond may occur only if the project is of a non-critical nature and the contractor/vendor is known to be reliable. No bond shall be required when the payment schedule is based on lump sum payment at completion of project.

305.2 TYPES OF BONDS AND DEPOSITS:

305.2.1 PUBLIC CONSTRUCTION BOND - (Performance & Payment Bond) - This type of bond is required when entering into formal contracts for new construction, repairs, or renovation on public buildings and/or other public works in accordance with F.S. 255.05. (Exhibit B, Basic instruction to Bidders, Item 13) The requirement for this bond with part of the advertisement for "Notice to Bidders" and a sample form for the Public Construction Bond will be included with bid package. This bond will be provided by the contractor awarded the bid for 100 percent of the bid amount prior to commencing the work.

305.2.2 BID BOND - GUARANTY OF GOOD FAITH DEPOSIT - At the discretion of the Purchasing Director and in the interest of the County, bidders may be required to submit with their bid or proposal a guaranty of good faith deposit in the amount normally of 5% of the bid price. When required, the advertisement for "Notice to Bidders" will include in the text of the notice that a 5% Bid Bond will be required in the amount of the bid when submitting a bid proposal.

305.2.3 Surety authorizing the Bid Bonds and Public Construction Bonds must be authorized to do business in the State of Florida. This statement must be in all bid advertisements for bids requiring these bonds. (F.S. 255.05(1)(a))

305.2.4 LETTER OF CREDIT

An irrevocable Letter of Credit may be accepted by the County in lieu of a public construction bond under conditions that the bidders provide a financial statement prior to authorization to accept the irrevocable Letter of Credit. (F.S. 255.05(7))

305.3 PROCESSING BONDS AND DEPOSITS:

- 305.3.1 The contractor shall be responsible for securing the necessary bond(s). Any cost may be included in the contract price.
- 305.3.2 The County Attorney who shall either accept or reject it for the Board of County Commissioners shall review surety bonds furnished. All surety bonds accepted shall be forwarded to the Clerk to be filed in the official contract records of the Board of County Commissioners.
- 305.3.3 In the event a contractor fails to provide an acceptable bond when required, within ten (10) days after notification, the County Attorney will be notified. Upon the recommendation of the County Attorney, the Board of County Commissioners may declare the Contract null and void and retain in the account of Columbia County any good faith deposits or guaranty which may have been submitted as liquidated damages.
- 305.3.4 Bonds, when accepted, shall be filed with the applicable contract documents in the Office of the Clerk.
- 305.3.5 Deposits. In lieu of a bid bond, the Purchasing Director may, at his discretion, authorize a contractor to submit a certified check, cashier's check, or treasurer's check, on any national or state bank. Such deposits shall be in the same percentage amounts as the bond. The Clerk shall retain such deposits until the County Coordinator is satisfied that all provisions of the contract have been complied with, cash bid security deposits will not be accepted. Upon award of Bid, the Purchasing Director shall be responsible for returning the Bid Bonds and other bid security to the unsuccessful bidders within fifteen (15) working days. (F.S. 255.05.)

SECTION 306
NEGOTIATED PURCHASES

306.1 COMPETITIVE BIDDING-EXCEPTIONS:

306.1.1 An exception to competitive sealed bidding is established because of the difficulty of requiring competitive bidding for certain services. These include but are not limited to the following services:

306.1.1.1 Architects, Engineers, Land Surveyors. The acquisition of these services costing over \$15,000.00 is covered under the Consultant's Competitive Negotiation Act (CCNA) (F.S. 287.055).

306.1.1.2 Professional services for special or unique skills, such as accountants, medical examiners, attorneys and other professions that in the opinion of the Purchasing Director qualify.

306.1.2 When competitive sealed bids have been received and the resultant bid prices either exceeds available funds, exceed cost estimates, or are not firm prices.

306.1.2.1 Generally, when competitive sealed bidding has been utilized, this method will be utilized in any re-bidding. However, in the above instances, and where extenuating circumstances exist, the Purchasing Director may seek the approval of the County Coordinator to conduct negotiations with all interested vendors after the original bids have been formally rejected or seek approval for the use of competitive sealed proposals as discussed in Section 302.

306.1.2.2 Negotiations are to be conducted by or in conjunction with, the Purchasing Director, who will then bring his recommendation to the County Coordinator for approval if the amount exceeds the Purchasing Directors approval level.

306.2 COMPETITIVE SEALED PROPOSALS:

The County may contract as a result of negotiation when there has been made a written determination approved by the Purchasing Director or County Coordinator.

306.2.1 Specifications that cannot be made sufficiently specific to permit award on the basis of the lowest bid price.

306.2.2 Sealed bidding is inappropriate due to limited sources of supply, a fixed-price contract is not applicable, or time and place of performance cannot be determined in advance.

- 306.2.3 Factors other than price must be used to determine what is in the best interest of the County. Since these factors would create the need for subjective judgments, there may be a need for discussion with the offerors after proposals are opened.
The criteria to be used in the evaluation must be submitted by the requesting department and approved by the Purchasing Director. The evaluation criteria should be mailed with the bid documents.
- 306.2.4 When a minimum specification cannot be met exactly by any prospective bidder, in this instance the best interest of the County would be served only by accepting proposals with which subjective judgments must be made to determine what will best serve the County's needs.
- 306.2.5 When competitive sealed bids have been received and the results are unacceptable to the County because of cost.
- 306.2.5.1 Procedure:
- 306.2.5.1.1 All requests to use the competitive sealed proposal method must be approved by the Purchasing Director or County Coordinator prior to use. At this time the requesting department will provide a listing of the proposed specifications and criteria to be used in the evaluation of the proposals and completely justify why this method of purchasing is needed.
- 306.2.5.1.2 A "Request for Proposals" will be utilized with the same requirements as the "Notice to Bids". (F.S. 287.012(15))

SECTION 307
CONTRACTING FOR PROFESSIONAL SERVICES

307.1 GENERAL:

This section of the manual is provided as information to County personnel requiring the professional service as defined in the Florida Statute for Professional, Architectural, Engineering, Landscape Architectural or Registered Land Surveyor Consultant services. "Consultants Competitive Negotiations Act." (F.S. 287.055.) This Section of the Manual will be the procedure used when providing requested professional services as identified herein and other professional services that in the opinion of the Purchasing Director qualify. .

307.2 INTRODUCTION

307.2.1 Purpose:

The purpose of this policy and procedures establishes Columbia County's compliance with F.S. 287.055, known as the "Consultant's Competitive Negotiation Act". The following is a summary:

Establishes contracting procedures by which Professional Architects, Landscape Architects, Engineers, and Registered Land Surveyors are to be selected for jobs with the State, its agencies, political subdivisions, and administrative boards. Provides that professional firms should be chosen on quality of personnel, past performance, and ability to meet time requirements. Provides for competitive negotiations with no less than three (3) firms most qualified for the job, and provides that the firm awarded a contract executes a truth-in-negotiation certificate for contracts of over \$150,000 or more. (F.S. 287.055(5)(a). The Certificate is to state that wage notes and other factual unit costs supporting compensation are accurate complete and current at the time of contracting. (F.S. 287.055)(5)(a)

The Board of County Commissioners, to avoid creating a conflict of interest, shall prohibit professional service firms from representing opposing sides of an issue under consideration.

Requires the County to announce in a uniform and consistent manner, each occasion when professional services are required for a project whose basic construction cost is estimated to exceed \$250,000 or for a planning or study activity when the fee for professional services does exceed \$25,000 except in case of a valid public emergency. (F.S. 287.055)

Prohibits the payment of contingent fees for such professional services and sets criminal penalties for violations of this prohibition. (F.S. 287.055(6))

307.3 POLICIES AND PROCEDURES

Revised 3/20/14

- 307.3.1 Public Announcement:
 - 307.3.1.1 Advertising will be in the legal ad section of a general circulation newspaper or specialty publication when deemed appropriate.
 - 307.3.1.2 Letters of notices will be mailed.
- 307.3.2 Scope of Services:
 - 307.3.2.1 The Purchasing Department will issue scope of Services along with Evaluation Criteria to interested firms.
- 307.3.3 Letters of Interest:
 - 307.3.3.1 Letters of interest and qualifications will be received by the Purchasing Department at 35 N. Hernando Street, P.O. Drawer 1529 Lake City, Florida 32056-1529.
- 307.3.4 Evaluation:
 - 307.3.4.1 Criteria to be used in the evaluation process shall include, but not be limited to, familiarity with Columbia County, previous professional services in the project area, past performance with Columbia County government, experiences with similar projects, current workload, proposed project schedule, quality of submittal, references and such other factors as may be determined to be applicable to the Board's particular requirements.
 - 307.3.4.2 Evaluation of Letters of Interest/qualifications will be by three (3) or more raters based on criteria shown on the Evaluation Sheet for Ranking of Design Professionals (Exhibit C). Please refer to Definitions of Evaluation Criteria (Exhibit D) attached. These exhibits are examples and may be modified depending upon the scope of the project.
 - 307.3.4.3 The composite score for all raters will be combined into the overall-ranking total.

- 307.3.5 Recommendation for Selection:
- 307.3.5.1 The Summary Sheet for Ranking of Design Professionals (Exhibit E) along with other supporting data will be presented to the Board of County Commissioners for approval of the ranking order and approval to negotiate beginning with the top ranked firm.
- 307.3.6 Negotiations:
- 307.3.6.1 Negotiating will be done jointly by the Purchasing Director, and other parties deemed appropriate, with the No. 1 ranked firm. The consultant will provide information determined to be necessary for negotiations.
- 307.3.6.2 In those cases where Purchasing Director has determined that the negotiated price is fair and equitable, an agenda item will be submitted to the Board of County Commissioners for their review and approval. If approved, the Purchasing Department will issue a contract.
- 307.3.6.3 In the event that an agreement cannot be reached on a price proposal, the affected firm will be notified in writing that negotiations have been discontinued and the basis for that action.
- 307.3.6.4 Negotiations will commence with the second firm.
- 307.3.6.5 Additional Contract Negotiations:
Selected firms shall be notified in order of their competence and qualifications and continue negotiations in accordance with this section until an agreement is reached.

307.3.6.6 Service Contracts Over \$150,000:

307.3.6.6.1 For all lump sum or cost-plus-a-fixed-fee professional service contracts over \$150,000, the Board of County Commissioners shall require the firm receiving the award to execute a truth-in-negotiations certificate stating that wage rates and other factual unit cost supporting the compensation are accurate, complete, and current at the time of contracting. Any professional service contract under which such a certificate is required shall contain a provision that the contract price shall be adjusted to exclude any significant sums where the Board determines the contract price was increased due to inaccurate, incomplete, or non-current wage rates and other factual unit costs. All such contract adjustments shall be made within one year following the end of contract. (F.S. 287.055)(5)(a))

307.3.6.7 Prohibition Against Contingent Fees:

307.3.6.7.1 The Purchasing Department shall be responsible for assuring that all contracts for professional services shall contain the required clauses as contained in subsection pertaining to "Consultants Competitive Negotiation Act". (F.S. 287.055)(6)(1-4))

SECTION 308
SURPLUS AND OBSOLETE PROPERTY

308.1 RESPONSIBILITIES:

The disposal of surplus or obsolete property will require authorization for disposal of surplus or obsolete property from the Board of County Commissioners, and will be recorded in the minutes. (F.S. 274.07). The Property Manager shall be authorized to dispose of surplus property under the bid limit (currently ~~\$7,500~~ **\$5000**) in a manner, which brings the most value to the County.

The Custodian or appointee will advise by memorandum to the Property Manager of all property declared surplus or obsolete and disposed of as required by "Florida Law". (F.S. 274.03)

308.2 PROCEDURE:

308.2.1 Each division and/or department will report its surplus or obsolete stock, equipment, or supplies to the Property Manager by completing the appropriate form, which form is supplied by the Property Manager (Exhibit F)

308.2.2 Delivery of surplus material to the designated area is the responsibility of the Maintenance Department. The Property Dept will insure the inspection of the items to verify the serviceability, condition, and original item cost.

308.2.3 The Property Dept will add the items to the "Surplus Property List". Once an item has been declared surplus, it becomes the responsibility of the Property Dept. It cannot be traded in, swapped, sold, cannibalized, or placed back into service, without the approval of the Property Director.

308.2.4 All division and department heads will review the "Surplus Property List" and notify the Property Director of any requirements for the material; priority normally will be given to the first division and/or department requesting the material. Before property is disposed of, the Property Dept will check with all other departments and constitutional officers to ascertain a need for the property.

308.2.5 The Property Department will then review the list as required to determine if there is a need for the items, which have not been requested by the division or department, by other governmental entities outside the County government within the County. (F.S. 125.35)

308.2.6 The Custodian or appointee will forward the surplus property list to the Property Director with one of the following recommendations for disposition:

Transfer to another department or division.

Trade in on new equipment.

Offer to governmental entities within Columbia County by sealed bid.

Cannibalize for parts.

Sell to public by auction or sealed bid.

Sell as scrap.

Dispose of as junk.

Donate to a non-profit organization which has as its principal mission: Public health and welfare; Education; Environmental restoration and conservation; civil and human rights; or the relief of human suffering and poverty.

308.2.7 Recommendations will be presented by the Custodian or appointee to the Board of County Commissioners for final approval. Board approval of items costing \$500 or more, which are accounted for by Property Control Numbers, shall constitute authorization to either transfer item(s) to surplus or drop the item from the property control register and authorize the item(s) to be scrapped.

308.2.8 Items reported, as surplus shall be transferred to a controlled area when approved by the Board of County Commissioners. The Fixed Asset Director will insure all materials in the controlled area are properly recorded and tagged.

308.3 PROCEDURE FOR SALE OF MATERIALS: (F.S. 274.05 & 06)

308.3.1 After being advised by the Custodian or appointee of the surplus the Property Director shall place a notice in a local newspaper of general paid circulation or specialized publication not less than one (1) week nor more than two (2) weeks prior to the sale. The advertisement will contain method of sale (auction or sealed bid), location of sale, location where list of materials being sold may be seen, time and date of sale. (F.S. 274.06)

308.3.2 The auction shall be conducted by or may be contracted out by the Property Department. The Finance Department shall have necessary personnel available to record sales and receive payment in the event items are auctioned.

308.3.3 Items shall be sold to the highest bidder and payment made at the time of the sale.

308.3.4 Items sold by either sealed bid or auction must be removed from the premises as soon as possible. The Property Department will determine the maximum

length of time granted to remove items. Under unusual hardships, the Property Director may grant exceptions to this provision. Neither the County nor any employee of the County may be held responsible for any materials remaining on County Property after a five- (5) calendar day period.

308.3.5 All sales items shall be paid in cash, certified check or money order at time of sale, or sale date. All sales are final, no warranties or guaranties implied. Items to be sold in "as is" condition shall be so noted in the advertisement and bid form.

308.3.6 When it is determined to be in the best interest of the County items may be sold by joining an existing auction. The Board of County Commissioners must approve all such transactions.

308.4 ITEMS APPROVED FOR CANNIBALIZATION:

All serviceable parts or items removed shall be placed in stock and the residue placed in scrap materials. Items that have been declared surplus may not be cannibalized without the approval of the Property Director.

308.5 SALE OF SCRAP MATERIALS: (F.S. 274.06)

Items that have lost all value in their original form or have been declared obsolete and can not be sold will be classified as scrap and will be sold to area scrap dealers at the highest price available or transferred to the Solid Waste Department for disposition.

The Property Director will contact at lease three (3) or more scrap dealers requesting they view the scrap available for sale by the County. The scrap dealer will then submit in writing a proposal of the price per pound that he will pay. This proposal should include the information providing containers for carrying scrap and the change in price per pound if Columbia County will put scrap in containers. The proposal most advantageous to the County will be the one accepted.

The scale used to weigh such items must be of the approved type capable of providing a printed receipt of the gross weight less tare weight and the net weight of each load of scrap. The receipt will be provided to the Columbia County Property Department along with payment for the scrap in money order or cashiers check and should be made payable to Columbia County. If no scale is available, the County will weigh the scrap at the Solid Waste Landfill scales prior to delivery of the scrap or pick-up by a scrap buyer.

Proceeds from the sale of scrap will be returned to the Property Director then forwarded to Finance as revenues to the general fund unless prohibited by statute or agreements, such as bonding obligations.

When approved by the Board of County Commissioners scrap may be donated to a non-profit organization which has as its principal mission: Public health and welfare; Education;

Environmental restoration and conservation; civil and human rights; or the relief of human suffering and poverty

308.6 PROCEDURE FOR SALE OR LEASE OF REAL PROPERTY: (F.S. 125.35)(b)

The Board of County Commissioners are authorized to sell and to lease real property belonging to the County whenever the Board determines that it is in the best interest of the County to do so.

308.6.1 Notice of sale must be published once a week for at least two (2) weeks in a newspaper of general circulation, published in the County, calling for bids on the property.

308.6.2 The highest bid complying with the terms and conditions in the Notice shall be accepted. Terms and conditions may differ from sale to sale at the discretion of the Board (i.e., amount of deposit required with each bid, appraisal to determine lowest bid to be accepted).

308.6.3 When the board of county commissioners finds that a parcel of real property is of insufficient size and shape to be issued a building permit for any type of development to be constructed on the property or when the board of county commissioners finds that the value of a parcel of real property is \$15,000 or less, as determined by a fee appraiser designated by the board or as determined by the county property appraiser, and when, due to the size, shape, location, and value of the parcel, it is determined by the board that the parcel is of use only to one or more adjacent property owners, the board may effect a private sale of the parcel. The board may, after sending notice of its intended action to owners of adjacent property by certified mail, effect a sale and conveyance of the parcel at private sale without receiving bids or publishing notice; however, if, within 10 working days after receiving such mailed notice, two or more owners of adjacent property notify the board of their desire to purchase the parcel, the board shall accept sealed bids for the parcel from such property owners and may convey such parcel to the highest bidder or may reject all offers.

308.6.4 The Purchasing Department processes bidding and advertising. The County Attorney administers title transfers, closing and land/building leases.

SECTION 309
PETTY CASH PURCHASES

309.1 GENERAL:

The cost of purchasing supplies and services of small monetary value through the usual purchasing procedure is usually excessive in relation to the value of supplies and services received. For this reason, the County has adopted a Petty Cash Purchase Procedure.

309.2 PETTY CASH PURCHASE AUTHORIZATION:

Petty Cash Purchases are authorized for minor purchases under \$100.

309.3 PETTY CASH FUNDS:

The Board of County Commissioners must authorize the establishment of a Petty Cash Fund and the amount of such a fund for any Department.

309.3.1 Any request for the establishment of such a Fund, or for an increase or decrease of the amount, by a Department should be submitted to the County Coordinator.

309.3.2 The County Coordinator shall submit all requests to the Board of County Commissioners for their consideration.

309.3.3 If approved by the Board of County Commissioners, the Finance Department will make the disbursement to establish or increase the fund.

309.3.4 In event of the disestablishment of a Petty Cash Fund, or the reduction of the amount authorized for such a fund, the Finance Department shall be responsible for recovering the appropriate amount from the Petty Cash Fund.

309.4 PETTY CASH CUSTODIAN:

In each Department authorized to maintain a Petty Cash Fund, the Department Director shall designate a single employee as Petty Cash Custodian, and another Employee as Relief Custodian.

309.4.1 Such designations must be made in writing and filed with the Finance Department.

309.4.2 The Department Director, the Petty Cash Custodian, and the Relief Custodian must have their signatures on file with the Finance Department, and must certify in writing to the Finance Department their knowledge and understanding of the policies and procedures governing Petty Cash.

- 309.4.3 Petty Cash Custodians will be accountable to the Finance Department for the fixed amount of the Petty Cash Funds under their custodianship.
- 309.4.4 Petty Cash Custodians will keep all Petty Cash Funds in a metal box equipped with a lock. At all times other than regular working hours, this locked box will be stored in a safe or in a locked desk.
- 309.4.5 No Employee other than the Custodian and Relief Custodian will have access to the Petty Cash Fund.
- 309.4.6 In the event of a change in the Petty Cash Custodian in a Department, the Former Custodian must submit the amount of the fund and any un-reimbursed vouchers to the Finance Department to close out the custodianship. Only after close out by the Former Custodian will the New Custodian receive custody of the Petty Cash Fund from the Finance Department.
- 309.4.7 Petty Cash Custodians will be liable personally for any loss or misapplication of the Petty Cash Funds under their custodianship, except in the case of theft.
- 309.5 **PETTY CASH DEPARTMENT PROCEDURE:**
Each Department Director authorized to maintain a Petty Cash Fund shall be responsible for enforcing the general authorization for Petty Cash Purchases within their Department.
- 309.5.1 Each Department Director shall establish Departmental Internal Control Procedures for making and approving Petty Cash Procedures.
- 309.5.2 Any employee so authorized by the Department procedure may make a Petty Cash Purchase directly from a vendor in accordance with the general authorization of Section 3.2.
- 309.5.3 A Department Director shall have authority to disallow any purchase not made in accordance with Department and County Policy and Procedure.
- 309.5.4 All Petty Cash Purchases must be approved in writing by the Department Director, who shall affix his/her signature upon all receipts/invoices turned in for reimbursement.
- 309.6 **PETTY CASH REIMBURSEMENTS:**
To obtain a Reimbursement for Petty Cash receipts, the Petty Cash Custodian will prepare a **PETTY CASH REPORT FORM** (Exhibit G) and submit it to the Finance Department.
- 309.6.1 A **PETTY CASH REPORT** may be prepared any time during the month when it is determined that a reimbursement is necessary, however a report must be filed

at least once per quarter. The report will be prepared as follows:

- 309.6.1 .1 Assign to the report a Transmittal Number that will be consecutively numbered for each fiscal year for the Department in the following format: "FY01-001," "FY01-002," etc.
- 309.6.1.2 Count all cash in the fund and record the amount counted on the PETTY CASH REPORT - "Total Petty Cash on Hand."
- 309.6.1 .3 Group all petty cash receipts to be reimbursed.
- 309.6.1.4 List and enter all receipts by receipt Number, the account number to be charged, and the dollar amount in the space provided. There must be a Vendor's Invoice or Receipt for each transaction listed.
- 309.6.1.5 Total of petty cash on hand and petty cash vouchers must equal petty cash fund amount.
- 309.6.1 .6 The report must be signed by the Custodian and approved by the Department Director for reimbursement.
- 309.6.2 After approval by the Department Director, the original of the PETTY CASH REPORT form along with all supporting receipts will be forwarded to the Finance Department. A duplicate copy of the report shall be maintained on file with the Petty Cash Custodian.
- 309.6.3 After receiving the PETTY CASH REPORT with supporting receipts, and after appropriate pre-audit review, the Finance Department will prepare the reimbursement payment for the department's petty cash fund.
 - 309.6.3.1 Payment will be charged against the appropriate departmental budgetary expenditure accounts.
 - 309.6.3.2 All payments reimbursing petty cash funds will be drawn payable to the respective petty cash custodian by their personal name and words "Petty Cash."

309.6.3.3 Any irregularity found during the pre-audit shall be reported immediately to the respective Department Manager.

309.7 PETTY CASH YEAR-END REIMBURSEMENT:

At the end of the fiscal year, all Petty Cash Vouchers must be submitted for reimbursement and cash balance taken to Finance for verification of fund amount on the last workday of the year. This year-end reimbursement and audit will insure that Petty Cash Purchases are recorded in the proper fiscal year and that proper control is maintained over all Petty Cash Funds.

309.8 DISALLOWANCE OF PETTY CASH PURCHASES:

Any Petty Cash Purchase not made in accordance with Department and County petty cash policies and procedures will not be paid or reimbursed by the County. Both the Department Director and the Finance Department shall have the authority to disallow any purchase not made in accordance with such policies and procedures.

SECTION 310
EMERGENCY PURCHASES

310.1 GENERAL:

An emergency purchase is defined as a one brought about by a sudden unexpected turn of events (Acts of God, riot, fires, flood accidents, or any circumstance or cause beyond the control of the department in the normal conduct of business) involving a threat to health, welfare, injury or loss to the Board, and which can be rectified only by immediate purchase of equipment, supplies, materials or services. Telephone quotes should be taken if possible, and followed up with written quotes. Results and action taken should be scheduled for board approval at their next scheduled meeting. If necessary the County Coordinator can approve the bid with the Board ratifying it after the fact.

310.1.1 Verification of Emergency – The department head shall file a written statement concerning the cause for the emergency purchase, verifying the conditions and circumstances requiring an emergency purchase. Said statement shall be submitted within five (5) days after the issue date of the purchase order and shall include details surrounding the event which created the emergency. A copy of the statement should be attached to the purchase order.

310.1.2 Responsibilities – The Purchasing Department is not responsible for any purchase made under this regulation as the burden of proof rests with the Department, however, the Purchasing Director will review all statements and, should there be any reasonable doubt that an emergency exists, an opinion will be filed with the County Coordinator for his/her review.

SECTION 311
SOLE SOURCE PURCHASES

311.1 GENERAL:

A sole source commodity is defined as a product that is non-competitive in price and/or specification. Purchase of goods from a single source must be qualified as such in advance of purchase. When requested by the Purchasing director a written declaration from the manufacturer of such commodities or a written statement by the originator of the requisition must accompany the purchase requisition form. The written letter of qualification must state that said equipment is not available from any other source, and must be filed with the Purchase Order.

SECTION 312
SMALL CONSTRUCTION PROJECTS

312.1 GENERAL:

This procedure outlines the process and responsibilities associated with the construction of small projects by the county and are applicable only to the procurements of such projects.

For the purpose of this procedure, “small projects” shall mean those construction projects that are estimated in accordance with generally accepted cost accounting principles to have construction costs not more than \$200,000: and do not require performance by an appropriately licensed Contractor.

312.1.1 The objective of this procurement procedure is to assure that materials and services are purchased at the lowest cost commensurate with the required quality, performance, and quantities in order to achieve maximum value for the taxpayers dollars.

312.1.2 All purchasing conducted for small projects shall be conducted without favor or prejudice to any party. In all solicitations, communications and evaluations, the highest standard of professionalism and integrity shall be maintained to promote fair and equitable treatment of all persons involved in the procurement conducted for these projects.

312.1.3 The Board shall automatically waive all other quotation and bidding procedures for small construction projects.

312.2 PROCUREMENT PLANNING:

The County may use the services of an architect/engineer, or may utilize other services as appropriate to develop, if needed, the project plans and specifications and construction schedules.

312.3 QUALIFICATIONS OF CONTRACTORS:

The County shall take steps to assure that responsible contractors perform construction and subcontractors found to be satisfactory to the County. The Contractors shall be subject to be able to prove their financial ability to carry on the work until first such time as he receives his first payment, and to finance the work between payments until the contract is completed and accepted.

312.4 ADMINISTRATION:

The County shall appoint a Project Manager to administer the project on behalf of the County. The Project Manager may be a regular County employee or may be an individual or firm retained on a contractual basis.

312.4.1 When available a minimum of three qualified Subcontractors or suppliers shall be invited to submit a verbal or written quotation for each division of

the project. (All quotes in excess of five thousand dollars (\$5,000) shall be followed by a written quote.)

312.4.2 Once selected, qualified Subcontractors or suppliers shall be notified and requested to submit quotes to the Purchasing Director.

312.4.3 Quote Evaluation and Award - The Purchasing Director will prepare a quote tabulation. The county reserves the right to negotiate with the lowest responsible and qualified bidder for each division the best possible price for the work to be performed and may, at it's sole option reject any and/or all quotes. Rejected quotes may lead to the following action:

- Re-quote original scope
- Revise scope and re-quote
- Sole source negotiations

Once the County has made a determination of a selected Subcontractor or supplier, the County by an official notice to proceed or Purchase Order will issue an award notice.

312.5 TEAM EFFORT:

The project procurement activities will be performed with input from the County, it's Project Manager, Subcontractors, and Architect/Engineer, working as a team.

312.6 FINANCIAL RECORDS:

The County shall keep detailed financial records on all small projects performed or administered on a "self administered" basis. The records shall fully track the actual expenditure made with the budget established for the project.

SECTION 313
FIXED ASSET INVENTORY PROCEDURE

313.1 GENERAL:

Any purchase of equipment with a value of \$500 or more, or a 3 year life shall be required to be recorded in the County's General Fixed Asset Inventory System and assigned a Property Identification Number.

313.2 PROCEDURES FOR RECORDING FIXED ASSETS:

- 313.2.1 Complete property record report form.
- 313.2.2 Submit both copies of property record report form to the Department of Property Management.
- 313.2.3 The Property Manager will assign an Identification Number, and enter the asset in the County's fixed asset management program.
- 313.2.4 The yellow copy of the property record report will be returned to the custodian with a county identification number affixed.
- 313.2.5 The county identification number should be attached to the fixed asset as soon as custodian receives it.
- 313.2.6 The identification number shall be noted on the purchase order when submitted for payment. If it is not Finance will return to Department for proper identification.

313.3 INVENTORY:

It is the responsibility of the custodian to safeguard the County's assets that are assigned to him/her. Printouts of Department inventories may be obtained by contacting the Department of Property Management.

- 313.3.1 The Director of Property Management shall conduct a physical inspection of all County assets at least once annually and shall report any shortages to the County Coordinator.

313.4 STOLEN ITEMS:

Stolen items should be documented on a Property Record Report form and a law enforcement investigation report should be completed and attached. These reports should be submitted to the County Coordinator's office.

Exhibit A

Columbia County Board of County Commissioners

Approved By _____
Board of County Commissioner

Vendor No. _____

Invoice No. _____

Total _____

Account No. _____

Payment To:

Internal Purchase Order Request
(Any Purchase \$100.00 and Under)

Quantity	Unit	Description	Unit Price	Total
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Total:

Exhibit B
Columbia County
Purchasing Department
General Instructions to Bidders

These instructions will bind bidders and conditions herein set forth, except as specifically qualified in special bid and contract terms issued with any individual bid.

1. The following criteria are used in determining low responsible bidder:
 - A. The ability, capacity and skill of bidder to perform required service.
 - B. Whether the bidder can perform service promptly or within specified time.
 - C. The character, integrity, reputation, judgment, experience and efficiency of bidder.
 - D. The performance of previous contracts with Columbia County.
 - E. The suitability of equipment or material for county use.
 - F. The ability of bidder to provide future maintenance.
2. Payment Terms are net (30) unless otherwise specified. Favorable terms, discounts, may be offered and will be considered in determining low bids if they are deemed by Purchasing Department to be advantageous to the County.
3. All bids should be tabulated, totaled and checked for accuracy. Unit price will prevail in case of errors.
4. All requested information shall be included in the envelope. All desired information must be included for your bid to receive full consideration.
5. If anything on the bid request is not clear, you should contact the Purchasing Director immediately.
6. A bidders list is available at the Purchasing Office.
7. Quote all prices F.O.B. our warehouse or as specified in bid documents.
8. Each proposal shall be clearly marked on the outside of the envelope including Fed Ex, UPS or other delivery service envelopes, as a sealed bid. The name of the item being bid shall be shown on the outside in full.
9. No responsibility shall attach to any County representative or employee for the premature opening of bids not properly addressed or identified.
10. If only one (1) bid is received, the bid may be rejected and re-advertised or excepted if determined to be in the counties best interest.
11. Bids received late will not be accepted, and the County will not be responsible for late mail delivery.
12. Telephone and facsimile bids will not be acceptable in formal bid openings (sealed bids). Should a bid be misplaced by the County and found later, it will be considered. Any bidder may request and shall receive a receipt showing the day and time any bid is delivered to the appropriate office of the County from the personnel thereof.
13. Bids requiring bid bonds will not be accepted if bond is not enclosed. Cash or certified check will be accepted in lieu of bond except on construction projects where cost exceeds \$40,000.
14. All bidders must be recognized dealers in the materials or equipment specified and is qualified to advise in their application or use. A bidder at any time requested must satisfy the Purchasing Office and the County Coordinator that he has the requisite organization, capital, plant, stock ability and experience to satisfactorily execute the contract in accordance with the provisions of the contract in which he is interested.
15. Any alterations, erasures, additions, or admissions of required information or any changes to specifications or bidding schedule are done at the risk of the bidder. Any bid will be rejected that has a substantial variation, that is; a variation that affects price, quantity, and quality or delivery date (when delivery is required by a specific time).

Revised 3/20/14

16. When requested, samples will be furnished to the County free of expense, properly marked for identification and accompanied by a list where there is more than one (1) sample. The County reserves the right to mutilate or destroy any sample submitted whenever it may be to the best interest of the County to do so for the purpose of testing.
17. The County will reject any material, supplies or equipment that did not meet the specifications, even though the bidder lists the trade names or names of such material on the bid or price quotation form.
18. The unauthorized use of patented articles is done entirely at the risk of the successful bidder.
19. The ESTIMATED QUANTITY given in the specifications or advertisements is for the purpose of bidding only. The County may purchase more or less than the estimated quantity and the vendor must not assume that such estimated quantity is part of the contract.
20. Only the latest model equipment as evidenced by the manufacture's current published literature will be considered. Obsolete models of equipment not in production will not be acceptable. The equipment shall be composed of new parts and materials. Any unit containing used parts or having seen any service other than the necessary tests will be rejected. In addition to the equipment specifically called for in the specification, all equipment catalogued by the manufacturer as standard or required by the State of Florida shall be furnished with the equipment. Where required by the State of Florida Motor Vehicle Code, vehicles shall be inspected and bear the latest inspection sticker of the Florida Department of Revenue.
21. The successful bidder on motor vehicle equipment shall be required to furnish with delivery of vehicle, certificate of origin and any other appropriate documentation as required by the Florida Motor Vehicle Department.
22. Prospective bidders are required to examine the location of the proposed work or delivery and determine, in their own way, the difficulties, which are likely to be encountered in the prosecution of the same.
23. All materials, equipment and supplies shall be subject to rigid inspection, under the immediate supervision of the Purchasing Department, its designee and /or the department to which they are delivered. If defective material, equipment, or supplies are discovered, the contractor, upon being instructed by the Purchasing Department or designee, shall remove, or make good such material, equipment, or supplies without extra compensation. It is expressly understood and agreed that the inspection of materials by the County will in no way lessen the responsibility of the Contractor release him from his obligation to perform and deliver to the County sound and satisfactory materials, equipment, or supplies. The Contractor agrees to pay the costs of all tests upon defective material, equipment, or supplies or allow the costs to be deducted from any monies due him from the County.
24. Unless otherwise specified by the Purchasing Department all materials, supplies, or equipment quoted herein must be delivered within thirty (30) days from the day of notification or exceptions noted on bid sheets.
25. A contract will not be awarded to any corporation, firm, or individual who is, from any cause, in arrears to the County or who has failed in former contracts with the County to perform work satisfactorily, either to the character of the work, the fulfillment or guarantee, or the time consumed in completing the work.
26. Reasonable grounds for supposing that any bidder is interested in more than one proposal for the same item will be considered sufficient cause for rejection of all proposals in which he is interested.
27. Submitting a proposal when the bidder intends to sublet the contract may be a cause for rejection of bids or cancellation of the contract by the County Coordinator.
28. Unless otherwise specified the County reserves the right to award each items separately or on a lump sum basis whichever is in the best interest of the County.
29. The County reserves the right to reject any and/or all quotations, to waive any minor discrepancies in the bids for all bidders equally, quotations, or specifications, when deemed to be in the best interest of the County and also to purchase any part, all or none of the materials, supplies, or equipment specified.

30. Failure of the bidder to sign the bid or have the signature of an authorized representative or agent on the bid proposal in the space provided will be cause for rejection of the bid. Signature must be written in ink. Typewritten or printed signatures will not be acceptable.
31. Any bidder may withdraw his bid at any time before the time set for the opening of the bids. No bid may be withdrawn in the thirty- (30) day period after bids are opened.
32. It is mutually understood and agreed that if at any time the Purchasing Department or designee shall be of the opinion that the contract or any part thereof is unnecessarily delayed or that the rate of progress or delivery is unsatisfactory, or that the contractor is willfully violating any of the conditions or covenants of the agreement, or executing the same in bad faith, the Purchasing Department or his designee shall have the power to notify the aforesaid contractor of the nature of the complaint. Notification shall constitute delivery of notice, or letter to address given in the proposal. If after three (3) working days of notification the conditions are not corrected to the satisfaction of the Purchasing Director, he shall thereupon have the power to take whatever action he may deem necessary to complete the work or delivery herein described, or any part thereof, and the expense thereof, so charged, shall be deducted from any paid by the County out of such monies as may become due to the said contractor, under and by virtue of this agreement. In case such expense shall exceed the last said sum, then and in that event, the bondsman or the contractor, his executors, administrators, successors, or assigns, shall pay the amounts of such excess to the County on notice made by the Purchasing Department or his designee of the excess due.
33. If the bidder proposes to furnish any item of foreign make or product, he shall write "foreign" together with the name of the originating country opposite such item on a proposal.
34. Any complaint form bidders relative to the invitation to bid or attached specifications shall be made prior to the time of opening bids; other wise, the bidder waives any such complaint.
35. Contracts may be cancelled by the County with or without cause on thirty- (30) days advance written notice.
36. All contractors submitting bids for road projects in excess of \$150,000 must be pre-qualified with the Florida Department of Transportation and shall provide proof of such qualification upon request.
37. Any bidder affected adversely by an intended decision with respect to the award of any bid, shall file with the Purchasing Department for Columbia County, a written notice of intent to file a protest not later than seventy-two (72) hours (excluding Saturdays, Sundays and legal holidays), after the posting of the bid tabulation. Protest procedures may be obtained in the Purchasing Department.
38. A person or affiliate who has been placed on the convicted vendor's list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to Columbia County, may not submit a bid on a contract with Columbia County for the construction or repair of a public building or public work, may not submit bids on leases of real property to Columbia County, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with Columbia County, and may not transact business with Columbia County for a period of 36 months from the date of being placed on the convicted vendor list.

