

**Board of County Commissioners
Leon County, Florida**

Workshop on Leon County's Purchasing Policy

**Tuesday,
September 24, 2024
3:00 p.m.**

**Leon County Courthouse
County Commission Chambers, 5th Floor
301 S. Monroe St. Tallahassee, FL 32301**

The media and the public can access the meeting in real time on Comcast channel 16, the Leon County Florida channel on Roku, the County's [Facebook](#) page, [YouTube](#) channel, [Twitter](#) and County [web site](#).

**Leon County
Board of County Commissioners**


**Notes for Workshop
Agenda Item #1**

Leon County Board of County Commissioners

Workshop Item

September 24, 2024

To: Honorable Chair and Members of the Board

From: Vincent S. Long, County Administrator 

Title: Proposed Revisions to County Policy No. 96-1, "Purchasing Policy"

Review and Approval:	Vincent S. Long, County Administrator
Department / Division Review:	Ken Morris, Assistant County Administrator
Lead Staff / Project Team:	Melanie Hooley, Director, Purchasing

Statement of Issue:

As requested by the Board, this workshop item provides a comprehensive analysis of the proposed revisions to County Policy No. 96-1, "Purchasing Policy." The proposed revisions to the Purchasing Policy seek to align the policy and procedures with current best practices, legal requirements related to government procurement, and update terminology for clarity and effectiveness.

Fiscal Impact:

This item has a positive fiscal impact. Replacing the publication of competitive solicitations in newspapers with digital advertisements on the County's website will save the County approximately \$4,000 annually.

Staff Recommendation:

Option #1: Approve the revisions to Leon County Policy No. 96-1, "Purchasing Policy" (Attachment #1).

Report and Discussion

Background:

On January 23, 2024, an agenda item was brought to the Board seeking to update County Policy No. 96-1, "Purchasing Policy." At that time, the Board tabled the item and requested a workshop in May 2024 to review the Purchasing Policy. Rescheduled due to the May 10th tornadoes, this workshop item provides a comprehensive analysis of the proposed revisions to the County's Purchasing Policy. The proposed revisions to the Purchasing Policy seek to align the policy and procedures with current best practices, legal requirements related to government procurement, and update terminology for clarity and effectiveness (Attachment #1). The current Policy has obsolete definitions and sections; does not include all current procurement methods allowed by law; and the small purchase thresholds are reflective of 2017 costs for commodities, equipment, and services.

Leon County purchasing is governed by ordinance, policy, and where applicable, State and Federal laws and regulations. The Purchasing Policy establishes specific directions and guidelines for all County departments and employees to use in procuring goods and services for a public purpose. The Policy ensures compliance with all relevant laws, rules, and regulations; promotes fair competition; ensures the cost-effectiveness and quality for goods and services; and maximizes value for taxpayers.

The Leon County Purchasing Division is responsible for the procurement of supplies, equipment, and services for all Leon County Government departments. The Purchasing Division administers the competitive solicitation process and coordinates all associated bid awards, proposals, evaluation processes, and contract development. In the ongoing effort to improve the acquisition of goods and services, a comprehensive review of the Purchasing Policy was conducted to identify areas needing revisions or updates. The Purchasing Division has identified revisions to the Policy to make it more structured and concise; eliminate ambiguous language; and provide consistency with current best practices and legal requirements for government procurement to achieve the most efficient and effective purchasing methods. The proposed revisions and reorganization of the Policy will make the document easier to read and interpret for both staff and prospective vendors. For ease of reference, the current Purchasing Policy and the red-lined version are provided as Attachment #2 and Attachment #3 respectively.

The Leon County Purchasing Policy was adopted by the Board in 1996 and has been revised 21 times. At the time of adoption in 1996, the Purchasing Policy encompassed both the County's procurement practices and the Minority, Women, and Small Business Enterprise (MWSBE) Program. Most of the revisions made to the Purchasing Policy have been primarily focused on updates and changes related to the MWSBE Program. Following the establishment of the County, City, and Blueprint Intergovernmental Agency MWSBE Program in 2020, the Board adopted the consolidated MWSBE Policy and approved corresponding revisions to the County Purchasing Policy. Today, the Purchasing Policy and procurement practices continue to ensure that County solicitations are conducted in compliance with, and in support of, the consolidated MWSBE Policy.

Analysis:

Public purchasing impacts local, state, and national economies through the expenditure of public resources each year. The County Purchasing Policy is designed to safeguard public funds, promote fair and open competition, ensure the efficient and effective operation of government programs, and provide confidence and transparency to the public that procurement is performed in an ethical and equitable manner. The Purchasing Division is responsible for maintaining the integrity of County purchases and the expenditure of taxpayer funds.

Leon County purchases a diverse array of goods and services each year, large and small, to support its operations and meet its responsibilities to citizens. The purchase of goods includes essential supplies such as office materials and uniforms, as well as larger investments such as vehicles, technology hardware, and public infrastructure projects. The County procures services ranging from design and construction professionals to waste management and cybersecurity services. The methods to procure goods and services are dependent on the type of product or service being sought, the purpose or need, the availability or specialized nature of the purchase, and the total cost. Each of these factors must be considered when determining the appropriate method of procurement while adhering to budgetary constraints and seeking to provide high-quality services to the community.

The Purchasing Division has identified revisions to the Policy to improve the acquisition of goods and services by making the Purchasing Policy more structured and concise, eliminating ambiguous and obsolete language, and updating the purchasing procedures to be consistent with current best practices and legal requirements for government procurement. As part of this comprehensive review, staff surveyed the purchasing policies and procedures of county governments in Florida to identify best practices including purchase and contracting authority thresholds as explained later in this analysis.

The analysis finds that revisions to the County Purchasing Policy are needed to ensure compliance with applicable State and Federal laws and regulations, and to achieve the most efficient and effective purchasing methods. The proposed revisions are organized and presented as follows: general revisions, legal updates, process improvements, purchasing thresholds, contract award and signature authority thresholds, and updates and clarifications to the purchase categories exempt from competitive procurement.

General Revisions

General revisions to the Purchasing Policy are recommended to make it more structured and concise, eliminate ambiguous, redundant, and obsolete language, and enhance the overall flow and clarity of the document. The proposed revisions include:

- Highlighting the rights of the Board and purpose of the Policy to succinctly identify the goals of the Policy and focus on the promotion of fair competition, quality, and cost effectiveness (Page 5 of Attachment #1).
- A restructuring of the document to remove unnecessary duplications.
 - In the current Policy, general requirements for all competitive procurements are outlined within each type of competitive solicitation (Invitation to Bid [ITB], Request

for Proposal [RFP], Consultants Competitive Negotiation Act [CCNA] RFP, etc.); these general requirements are identical in each paragraph. The redundancy of this language causes the Policy to be unnecessarily cumbersome. Section 6.08(A) (Page 18 of Attachment #1) of the proposed revisions outlines the overall general requirement of every competitive solicitation. Subsequent subparagraphs 6.08.1 – 6.08.4 (Pages 22–26 of Attachment #1) outline only those remaining provisions required by each specific solicitation type. The general requirements have simply been relocated and the duplications removed.

- Addition of relevant terms and definitions, and removal of obsolete and duplicative terms to ensure that the Policy and procedures are clear to staff and prospective vendors (Page 8 of Attachment #1).
- Removal of obsolete references to petty cash which is no longer utilized by County employees and is not an allowable method of procurement. At the Board's direction, Purchasing Cards are now used for small purchases instead of petty cash. Purchasing cards offer enhanced security and substantial rebates that are not available with petty cash purchases.
 - The close-out of petty cash funds was conducted by the Finance Division in 2019 to eliminate petty cash funds from all departments. A follow-up audit conducted by the Treasury Team and Internal Auditors confirmed that all petty cash had been collected.

Legal Updates

Leon County purchasing is governed by County Ordinances, policies, and where applicable, State and Federal laws and regulations. In consultation with the County Attorney's Office, the following revisions seek to ensure compliance with applicable State and Federal laws and regulations to achieve the most efficient and effective purchasing methods:

- Updates to the required E-Verify language per Section 448.095, Florida Statutes (Page 30 of Attachment #1). The "E-Verify system" is an Internet-based system operated by the U.S. Department of Homeland Security which allows participating employers to electronically verify the employment eligibility of new personnel.
 - On April 26, 2011, the Board authorized the Chairman to execute a Memorandum of Understanding (MOU) with the U.S. Department of Homeland Security agreeing that the County will abide by the current legal hiring procedures. The system utilized to ensure compliance is referred to as "E-Verify".
 - Since 2020, section 448.095, Florida Statutes prohibits a public employer, contractor, or subcontractor from entering into a contract unless each party to the contract registers with and uses the E-Verify system. Section 448.095(5), Florida Statutes, also requires subcontractors to provide affidavits stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien; and requires contractors to maintain the affidavits for the duration of the contract.
 - The edits to the Policy reflect the affidavit requirement and were made in accordance with current requirements in Florida Statutes.

- Updates to Legal and Official Advertisements in accordance with Chapter 50, Florida Statutes, (2023) which no longer requires newspaper advertisements for competitive solicitations (Page 18 of Attachment #1). Local governments may now utilize digital advertisements for competitive solicitations such as Invitations to Bid or Requests for Proposals. While most contractors receive notifications via multiple digital platforms and notification systems, the current Policy still requires these solicitations to be advertised in a newspaper of general circulation. Eliminating the advertising requirement in print newspapers is consistent with previous Board action related to the use of digital notices for public meeting notices. This change is expected to save the County approximately \$4,000 annually.
 - On July 11, 2023, the Board adopted Ordinance No. 23-10 which requires the County to host a publicly accessible website for the digital publication of certain advertisements and legal notices as allowed by Florida Statutes.
- Updates to the Bid Protest Procedure to address the rare instances when a bidder challenges the County's procurement process and initiates a Bid Protest (Page 27 of Attachment #1).
 - Updates the language for ease of understanding including the requirements for 'standing' to protest a solicitation. In the context of procurement and bid protests, standing typically means that the party challenging the process must show that they were directly affected by the procurement decision, such as being a competing bidder who believes their bid was unfairly excluded or improperly evaluated.
 - Ensures consistency in the timing for filing notices and formal written protests.
 - Clarifies evidentiary requirements and establishes timelines for the submission and presentation of evidence in protest proceedings.
 - Eliminates the alternative bid protest procedure requiring the appointment and retention of a special master or administrative law judge to conduct evidentiary proceedings during bid protests.
- Include and define the Invitation to Negotiate (ITN) solicitation option (Page 26 of Attachment #1).
 - The County has been using the Invitation to Negotiate (ITN) process in compliance with Florida Statutes, but the current Policy lacks specificity or a defined process for an Invitation to Negotiate (ITN) solicitation.

Process Improvements

The proposed process improvements seek to enhance the procurement process for prospective vendors through the most efficient and effective purchasing methods. The revisions to the Purchasing Policy will further enhance supplier confidence by ensuring that goods and services are procured through fair and open competition, increase the number of opportunities for the County to hire local small businesses, and expand the use of MWBE aspirational goals to include informal bids. These process improvements include:

- Discontinue the use of Field Quotes and removal of obsolete references.

- Field Quotes are an outdated and rarely used informal bidding process for inexpensive purchases under \$5,000. The informal solicitation is decentralized and led by the County department seeking to make the purchase rather than the Purchasing Division.
- Staff recommends the use of Purchasing Quotes in favor of Field Quotes which requires three competitive quotes and the approval of the Purchasing Director to ensure greater oversight of the purchase of goods and services. No changes to the Purchasing Quotes process are necessary, however, another recommendation later in this item seeks to adjust the purchasing thresholds to offset the elimination of Field Quotes.
- Procedural revisions for Informal Bids to align with current best practices that ensure greater safeguards and fair competition (Page 15 of Attachment #1).
 - An informal bid is defined as a "written solicitation method used by the County for securing prices and selecting a provider of commodities or services...". The purchasing threshold for informal solicitations is \$50,000 - \$100,000.
 - Informal bids are advantageous because they enable the County to engage small local firms for projects that might not attract larger firms.
 - The Policy currently allows the Purchasing Director or designee to email a minimum of three vendors and obtain three quotes. While legally permissible, it is an outdated practice and the proposed revision provides greater safeguards to ensure fair competitive practices.
 - The proposed revision to the informal bid process would implement the same level of review and oversight as a formal solicitation. Instead of emailing vendors, informal bids will be posted through the County's online procurement platform (OpenGov Procurement). This shift to a sealed bid process will enhance supplier confidence by ensuring that goods and services are procured through fair and open competition.
 - The revised informal bid process will incorporate input from the MWSBE Division to include aspirational goals where appropriate and feasible, and will feature a formal bid opening.
- Addition of an Informal Bid Process reserved for Small Business Enterprise (Page 15 of Attachment #1).
 - Where feasible, the County may reserve contracts for competition among only certified Small Business Enterprises (SBE) firms.
 - The revised Policy adds, appraises, and defines an informal bid process specifically reserved for SBEs.
 - Based on input from the MWSBE Division, project solicitations may be reserved specifically for certified SBEs. While the procedure will follow the informal bid process, the bid will be advertised and solely eligible to certified SBEs.
 - The SBE Program is race and gender neutral, and certified firms must have a net worth of less than \$5 million.
 - The proposed informal bid process for SBEs would differ from regular informal bids by having a significantly higher maximum cost limit of \$300,000, which would enhance procurement opportunities for local small businesses.

Purchasing Thresholds

Section 6 of the revised Policy (formerly Section 5) provides the purchasing thresholds and procedures related to small purchases, informal bids, competitive sealed solicitations, and blanket purchase orders (Page 14 of Attachment #1). A purchasing threshold is the monetary limit or range used to determine the appropriate procurement method for acquiring goods or services. These thresholds are designed to ensure the County operates efficiently and secures the best value. The purchase amount also determines the appropriate approval level in the organizational structure and provides controls for budget management, compliance, and oversight, which are described in the next section of this item. Overall, purchasing thresholds are a key element in managing procurement effectively, balancing efficiency with oversight and control.

As part of the comprehensive review of the Purchasing Policy, staff evaluated the County’s current purchasing thresholds and patterns with the current market pricing of goods and services. This included an analysis of the purchasing policies of other county governments in Florida and the City of Tallahassee to evaluate their established purchasing methods and thresholds to facilitate their procurement needs. Purchasing thresholds are routinely evaluated to ensure that they remain relevant and practical for the County’s procurement needs and keep pace with inflation by adapting to evolving economic conditions. Table #1 provides each of the recommended changes related to the County’s procurement methods and associated purchasing thresholds followed by a summary for each of the recommendations.

Table #1: Purchasing Process Thresholds (Pg 14 of Attachment #1)

Procurement Method	Current Threshold	Proposed Threshold
Small Purchase Procedures – Tangible Property/Controlled Asset	\$1 to \$1,000	\$1 to \$1,000
Consumables	\$1 to \$2,500	\$1 to \$3,500
Warehouse Operations	\$1 to \$5,000	\$1 to \$7,000
Purchasing Quotes	\$5,000.01 to \$50,000	\$3,500.01 to \$50,000
Bid – Informal Bid Process – Standard	\$50,000.01 to \$100,000	\$50,000.01 to \$100,000
Bid – Informal Bid Process for Small Business Enterprise Program	N/A	\$50,000.01 to \$300,000
Bid – Informal Bid Process for Tenant Renovations / Improvements to County Space Leased by Private Entities	\$50,000.01 to \$200,000	\$50,000.01 to \$200,000
Competitive Procurements	\$100,000.01 and above	\$100,000.01 and above
Blanket Purchase Orders – Non-contractual	Not to exceed \$5,000	Not to exceed \$10,000
Contractual	Not to exceed annual contract value	Not to exceed annual contract value

"Small Purchases" are the procurement of commodities or services with a low value which does not require the use of quotes, bids, or public notice. Small purchases are usually completed using a County issued Purchasing Card (P-Card). Examples of consumable small purchases include office supplies, operating supplies, and same day services. The Policy provides for three types of small purchases (tangible property / controlled assets, consumables, and warehouse operations), each with different purchase thresholds.

The small purchase thresholds have not been increased since 2017 and the threshold limits for consumable items and warehouse operation purchases no longer reflect market trends and shelf item costs. Warehouse operation purchases are commonly used supplies and tools such as shovels, bug spray, and sanitizer which are bought in bulk to leverage economies of scale and secure the best prices. The comparative analysis shows that most local governments have higher thresholds for small purchases, even when compared to the recommended increases as follows:

- Increase the small purchase threshold limits for consumables from \$2,500 to \$3,500 and the warehouse operations from \$3,500 to \$7,000 to reflect current pricing. No changes are recommended for the purchase of tangible property / controlled assets.

A process improvement described earlier in this item is the discontinuance of Field Quotes as a procurement method. The discontinuance and removal of references to Field Quotes, combined with the modest increase to the small purchase thresholds, necessitates an adjustment to the threshold for Purchasing Quotes. The procurement of goods and services currently requires competitive Purchasing Quotes from three or more vendors for items above \$5,000 (and up to \$50,000). All Purchasing Quotes require the review of the Purchasing Director or designee. Lowering the threshold for obtaining Purchasing Quotes to \$3,500 will enhance oversight for all purchases exceeding the small purchase threshold, ensuring improved value and more efficient procurement processes.

- Lower the Purchasing Quote threshold from \$5,000 to \$3,500 to enhance oversight on all purchases exceeding the small purchase threshold.

A Blanket Purchase Order (BPO) is a tool used by staff to expedite the provision of services and facilitate payment for those services. BPOs are typically issued for vendors who have been awarded a continuing service agreement (CSA) through a competitive solicitation, or for procurements that are exempt from competitive procurement processes, such as fleet vehicle repairs. BPO's help control administrative costs and expedite payments to vendors for needed services. For example, if a County vehicle requires OEM (Original Equipment Manufacturer) parts for repair, staff can immediately contact the local distributor with an existing BPO of \$5,000 and arrange for the necessary parts to be delivered. Issuing BPOs for small purchases is more efficient than using a purchasing card which can include fees or surcharges and requires a greater administrative burden to reconcile receipts for small purchases. The proposed revision seeks to raise the maximum allowable amount for a BPO from \$5,000 to \$10,000. However, the maximum single transaction charge on a BPO will continue to align with the small purchase thresholds.

- Increase the Blanket Purchase Order maximum threshold from \$5,000 to \$10,000.

Contract Award and Signature Authority Thresholds

In addition to establishing purchasing thresholds for each procurement method, Section 6 of the revised Policy (formerly Section 5) prescribes the approval authority and limitations for the Purchasing Director and County Administrator to award and execute contracts. Authorization to award and sign contracts are based on the value of an agreement to ensure oversight and accountability, efficiency, and compliance.

Approval thresholds ensure that significant expenditures are subject to appropriate levels of scrutiny and oversight in the organization, and to ensure compliance with relevant laws, regulations, and internal policies. Higher thresholds typically require more senior approval, which helps prevent unauthorized or imprudent spending. Approval thresholds also help streamline procurement processes. For lower-value purchases, a simplified approval process can reduce administrative burden and expedite acquisitions while still maintaining greater oversight for more impactful purchases. By having different approval levels, governments can better manage the segregation of duties, reducing the risk of fraud or mismanagement. Different levels of authorization ensure that no single individual has unchecked control over significant financial decisions.

The County Purchasing Policy currently delegates approval thresholds to the Purchasing Director and County Administrator up to \$100,000 and \$250,000 respectively. The awarding of any contracts greater than \$250,000 requires Board approval. Table #2 provides the proposed revisions to the approval thresholds for the Purchasing Director and County Administrator to award and execute contracts on behalf of the County followed by a summary of the survey findings and recommendations.

Table #2: Contract Award and Signature Authority Thresholds (Pg 14 of Attachment #1)

Individual	Threshold*
Purchasing Director	Procurement Agreements up to \$125,000
County Administrator	Procurement Agreements up to \$250,000 and Employee Benefits Agreements**
Board of County Commissioners	Procurement Agreements greater than \$250,000

**All contracts will be in a form approved by the County Attorney’s Office prior to execution. Term Contracts will be awarded based upon the value of the initial term of the contract.*

*****Signature Authority shall be limited to new benefits programs provided at no cost to the County and the execution of employee benefits agreements with existing providers, subject to available funding authorized by the Board.***

As part of this analysis, staff evaluated and compared the approval thresholds delegated to the Purchasing Director and County Administrator in the Purchasing Policy with other local governments in Florida including the City of Tallahassee. Approximately one-third of the 20 local governments surveyed, including the City of Tallahassee, utilize a blended structure for awarding contracts. A blended structure provides specific approval thresholds for the Purchasing Director and County Administrator with certain exceptions to exceed the thresholds. The most common

exception relates to whether the project was approved by the governing body in the Capital Improvement Plan (CIP). If so, some jurisdictions establish a higher approval threshold (Seminole County is \$500,000) while others allow for an unlimited approval threshold such as Volusia and St. Lucie Counties. Other examples of these exceptions include purchases related to cybersecurity, competitive solicitations that only have one qualified respondent, and procurements that are piggybacked off a state contract.

The County Purchasing Director's signature authority threshold of \$100,000 is squarely among the middle of the local governments surveyed with a traditional value-based structure. However, most of the local governments utilizing the blended approach allow for the execution of more costly agreements by the Purchasing Director and/or the County Administrator for projects already approved in the CIP. The City of Tallahassee authorizes its Purchasing Director to approve awards of up to \$125,000. This item recommends maintaining the value-based structure and increasing threshold to align with the City, reflect inflationary changes in the market, and continue to facilitate an efficient procurement process.

- Increase the Purchasing Director's authority to award contracts from \$100,000 to \$125,000.
 - The increase will provide the Purchasing Director the authority to approve contracts up to \$125,000. The approval authority does not change any method of procurement or competitive solicitation requirement. The adjustment to the approval authority correlates to the increase in costs for goods and services and will allow for the execution of lower cost agreements in a timelier manner.
 - Contract awards and signature authority thresholds requiring Board approval remain unchanged. All awards exceeding \$250,000 will continue to require Board approval.

The comparative analysis of approval thresholds among County Administrators finds that six counties have the same (Pinellas, Collier, Hillsborough) or higher (St. Johns, Martin, Sarasota) thresholds than the \$250,000 limit for Leon County. Another six counties and the City of Tallahassee utilize the blended approach. The City of Tallahassee authorizes the City Manager to execute agreements up to \$250,000 but the City Manager can exceed this threshold for projects and contracts previously approved by the City Commission in the CIP. The analysis supports maintaining the current approval threshold for the County Administrator and staff recommends adding the delegation of signature authority to execute certain employee benefits service agreements as described in the next section.

- Maintain the County Administrator's authority to award contracts up to \$250,000 and delegate signature authority to the County Administrator to execute certain employee benefits service agreements.
 - This revision would provide the County Administrator signature authority to approve certain employee benefits service agreements, in a form approved by the County Attorney, which are often time sensitive and require timely execution.
 - The County provides a competitive and comprehensive benefits program that enables participants to select the benefits best suited for the physical and financial needs of employees and their families. Each year, the Division of Human Resources directs the County's contracted benefits broker to research options that would benefit Board

employees. Human Resources also considers employee requests and the data provided by our health insurance providers to determine ancillary products that may be beneficial to our employees.

- Most benefit providers operate under multi-year agreements and require a contract or agreement with the employer, whether the associated fees are paid by the Board, County employees, or by the County's broker.
- Annual changes in the rates or costs to the County for employee benefits are considered during the budget development process. Following the Board's adoption of the tentative budget in July, the open enrollment process is scheduled for the fall. Renewal agreements must be executed with established vendors seeking rate or plan changes. Should new optional benefit programs be identified to offer to employees at no cost to the County, service agreements must also be executed for the new programs.
- The proposed signature authority would be limited to new benefits programs provided at no cost to the County and the execution of employee benefits agreements with existing providers, subject to available funding authorized by the Board during the annual budget process. Board approval will still be necessary for benefits service agreements with new vendors that require County funds.

Update Purchase Categories Exempt from Competitive Procurement

Exemptions from the competitive procurement process are authorized in Florida Statutes and County Policy for finite and deliberate circumstances including the need to quickly respond during emergencies and the purchase of specialized equipment or services. Exemptions can provide flexibility to address unique situations or urgent needs that do not fit neatly into standard procedures. Some items or services might be so specialized or critical that they require a different approach.

The following provides clarifications to existing exemptions from the competitive procurement processes (Page 5 of Attachment #1) to reflect more modern definitions (digital library materials and artistic services) and the specialized nature of certain services (employee recruitment).

- Postage.
 - Postage should be added to the existing items exempt from competitive procurement as the rates are determined and controlled by another governmental authority.
- Digital library media and materials.
 - For most governmental entities, the purchase of printed library materials is exempt from competitive procurement requirements. However, the current Policy does not account for advancements in technology. Given the growing prevalence of digital library materials, updating this exemption to recognize digital library media and materials is essential.
- Software maintenance agreements for installed software.
 - New software packages are competitively procured to ensure a fair and competitive selection process. The current Policy exempts software modifications and enhancements to existing software from the competitive procurement process.

- The recommended revision seeks to clarify this exemption includes necessary software maintenance agreements.
- Music, entertainment, creative writing, photography, digital art, and fireworks.
 - The current Policy allows for the exemption of artistic services, works of art, and art design and conservation services from competitive solicitation. The proposed revision expands the definition of artistic services to include music, entertainment, creative writing, photography, and fireworks.
 - On January 23, 2024, the Board similarly approved exemptions for the procurement of artistic services related County Tourism events.
- Employee recruitment services.
 - The County occasionally engages employment recruiting services to fill executive-level or highly specialized positions that have a very limited pool of qualified candidates.
 - The competitive procurement exemption will allow Leon County to utilize specialty and local head-hunters or recruitment services. The County still intends to competitively solicit for general temporary employment agencies.
- Purchases made with a Purchasing Card pursuant to Leon County Purchasing Card Policy No. 00-07.
 - Purchasing Cards are utilized as a payment method, providing the County with enhanced security and substantial rebates, and are commonly used to pay for items that do not require a competitive procurement such as airfare, hotels, meals for staff training, etc.
 - Only purchases within the small purchase threshold can be made with a Purchasing Card and there are no competitive procurement requirements for said purchases.
 - As requested by internal auditors, the explicit inclusion of this exemption in the Policy would be consistent with the current requirements in the Purchasing Policy and Purchasing Card Policy No. 00-07.

Conclusion:

The revisions to the Purchasing Policy seek to improve the acquisition of goods and services by making the Policy more structured and concise, eliminating ambiguous and obsolete language, and updating the purchasing procedures to be consistent with current legal requirements for government procurement. Overall, these revisions will ensure that the Purchasing Policy is more effective, efficient, and aligned with current best practices in promoting fair and open competition for the vendor community, strengthen the fiscal integrity of the purchasing process, and provide confidence and transparency to the citizens of Leon County.

Options:

1. Approve the revisions to Leon County Policy No. 96-1, "Purchasing Policy" (Attachment #1).
2. Do not approve the revisions to Leon County Policy No. 96-1, "Purchasing Policy".
3. Board direction.

Recommendation:

Option #1

Attachments:

1. Proposed Purchasing Policy No. 96-1
2. Current Purchasing Policy No. 96-1
3. Red-lined Revisions to the Purchasing Policy No. 96-1

Leon County Government Leon County, Florida

Policy No. 96-1

Title: Purchasing Policy

Date Adopted: **October 8 , 2024**

Effective Date: **October 8, 2024**

Reference: Chapters 274 and 287, Florida Statutes

Policy Superseded: Policy No. 96-1, "Purchasing Policy"; adopted January 16, 1996; revised November 25, 1997; February 24, 1998; March 22, 2005; December 13, 2005; June 13,2006; February 26, 2009; October 27, 2009; February 9, 2010; March 23, 2010; October 12, 2010; June 14, 2011; August 23, 2011; November 8, 2011; February 14, 2012; March 13, 2012; February 12, 2013; October 29, 2013; January 27, 2015; June 20,2017; November 12, 2019; February 25, 2020; July 13, 2021

It shall be the policy of the Leon County Government, that Policy No. 96-1, "Purchasing Policy", revised by the Board of County Commissioners on July 13, 2021 is hereby further amended, and a revised policy is hereby adopted in its place, to wit:

LEON COUNTY GOVERNMENT

Purchasing Policy



**LEON COUNTY GOVERNMENT
Purchasing Policy**

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Section 1 PURPOSE

The purpose of this Purchasing Policy is to establish specific directions and guidelines for all County Departments, and employees of Leon County to use in procuring goods and services for a public purpose. This policy aims to promote fair competition, maximize value for taxpayers, and maintain high-quality standards for goods and services procured. This policy will serve as a guiding framework ensuring cost-effectiveness, quality assurance, and compliance with all relevant laws, rules, and regulations.

Section 2 RIGHTS OF BOARD OF COUNTY COMMISSIONERS

Nothing in this Policy shall be deemed to abrogate, annul, or limit the right of the Board in accordance with Florida law and in the best interests of the County, to reject all bids/proposals received in response to a solicitation, to determine in its sole discretion the responsiveness and responsibility of any bidder/proposer, to approve and authorize or to enter into any contract it deems necessary and desirable for the public welfare, or to vary the requirements of the Policy in any instance when necessary and desirable for the public welfare.

Section 3 APPLICATION OF POLICY

- A. Contracts: This policy shall apply to contracts/agreements solicited or entered into after the effective date of this policy or subsequent amendments or revisions, unless the parties agree to its application to a contract solicited or entered into prior to the effective date.
- B. Activities: The provisions of this policy shall apply to every purchase of goods and services by the County, unless exempted herein or an alternative purchasing procedure is required by federal or state law grant provisions.
- C. Exemptions from competitive procurement processes. The following exemptions do not preclude the County from utilizing competitive procurement practices where possible. The following types of purchasing activities shall be exempt from competitive procurement processes except as noted:
 - 1. All heavy equipment repairs shall be exempted from the competitive sealed bid requirements. The Division Director or designee shall solicit and evaluate quotations and make a recommendation for award. The Purchasing Director shall review the quotations and the recommendation for award and award of the bid shall be made by the appropriate authority as provided in Section 6.0.
 - 2. All purchases of services from a utility whose rates are determined and controlled by the Public Service Commission or other governmental authority, including but not limited to postage, electricity, water, sewer, telephone, and cable television services.
 - 3. All supplies, materials, equipment, or services purchased at a price established in any of the authorized forms of state contracts of the State of Florida Department of Management Services, Division of Purchasing, under the terms and conditions of a cooperative purchasing agreement or term contract by other governmental units, or through other cooperative purchasing organizations.
 - 4. All supplies, and materials, equipment, construction, or services purchased from another unit of government not otherwise limited or prohibited by law.
 - 5. Service/Maintenance Contracts: Continuing service and/or maintenance contracts that are initially awarded as a part of product acquisition/installation to a vendor who is the manufacturer, developer, or who is the authorized service agent thereof and for which funds are annually appropriated in the budget are exempt from further competitive requirements of this policy. Examples are software/hardware

- maintenance, building systems maintenance, right-of-way maintenance agreements, security systems, etc.
6. Real property, real estate brokerage, options of title or abstracts of title for real property, title insurance for real property, and other related costs of acquisition, rental, or sale of real property.
 7. All purchases of used equipment having a value of \$50,000 or less; however, each such purchase shall be supported by one equipment appraisal report from the vendor.
 8. All purchases of used equipment having a value greater than \$50,000 and less than \$100,000; however, each such purchase shall be supported by two independent equipment appraisal reports.
 9. Library Media and Materials (both digital and printed). The purchase of library books, education and/or personnel texts, textbooks, printed instructional materials, reference books, periodicals, databases, indexes, pre-recorded library media materials, e.g. audio and video cassettes, film strips, films, sound recordings, computer software, etc., and printed library cards that are to be a part of the library collection.
 10. Advertisements.
 11. Training Media and Services. When such materials or services are available only from the producer, publisher, owner of the copyright or patent, educational institution or training service provider, which developed the training program, the purchase, is exempt from competitive requirements. Approval thresholds in Section 6.0 shall apply.
 12. Software. Upgrades, software modification services by the copyright holder, maintenance agreements, and related software enhancements to installed software purchased through competitive means or otherwise awarded are exempt. The purchase of new software packages or systems shall follow the thresholds and procedures of the policy to ensure competitive selection.
 13. Corporate and media sponsorship agreements.
 14. Licensed health professionals, e.g., Doctors, Nurses, Veterinarians who provide service directly to patients.
 15. Continuing education events or programs. Training and educational courses, contracts between the County and governmental entities or nonprofit corporations, dues or memberships, publications, meeting rooms, and hotels when any of the procurements listed previously are below the formal bid threshold in Section 6.0.
 16. Lectures by individuals.
 17. Artistic services. Music, entertainment, creative writing, photography, digital art, fireworks, works of art, and art design and conservation services.
 18. Contracts between the County and governmental entities or nonprofit corporations.
 19. Services of legal counsel authorized by the Office of the County Attorney, including, but not limited to, attorney, expert witnesses, conflict counsel, court reporters, paralegal, mediator, and other services required by the Office of the County Attorney.
 20. Travel arrangements and expenses. (Reference Policy No. 09-1, Travel).
 21. Tourism Event Hosting Applications/Requests/Bids. (Reference Policy No. 21-6, County Tourism Policy).

22. Revenue Generating contracts.
23. Tourism-related services, goods, or commodities authorized by the County Administrator or designee, including, but not limited to, special event bids/applications/requests, advertising, sponsorships, consignment agreements for items and products in County Tourism's Visitor Information Center, and other services, goods, or commodities as required to promote Leon County as a destination to visitors and event organizers. (Reference Policy No. 21-6, County Tourism Policy).
24. Food, to include water and beverages, may be purchased with an explanation of the public purpose. (Reference Policy No. 04-6, Policy for Purchases of Food, Beverages, and Supplies).
25. Grants (Direct Payment) by the County and social services (e.g. burials, reimbursable emergency assistance payments to approved social service agencies, down payment assistance, temporary housing relocation expenses and indigent medical and tubercular care patient services).
26. Employee recruitment services that include, but are not limited to, temporary employment services, recruitment or headhunter services, and job posting services.
27. Purchases made with a Purchasing Card pursuant to Leon County Purchasing Card Policy No. 00-07.
28. Any other commodities or contractual services listed in Section 287.057 (3) e., Florida Statutes.

D. Utilization of Minority, Women, and Small Business Enterprises

Leon County procurement activities will be conducted in compliance with the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy as adopted by the Leon County Board of County Commissioners on February 25, 2020 and as amended. Employees are encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the procurement process, when available.

Whenever practicable, at least one of the three quotes/bids from certified minority, women, and small business enterprises shall be secured for Small Purchases, Purchasing Quotes, and Informal Bids. The Purchasing Director or designee shall review the quotations and make the award or require additional quotations/bids prior to award.

E. Environmentally Preferred Purchasing

1. The County will seek to increase acquisition and utilization of environmentally preferred products and services, consistent with price, performance, availability and safety considerations. Environmentally preferred purchases are products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose.
2. The County may consider paying a reasonable premium for environmentally preferred products and services.
3. Any vendor contracting with the County is encouraged to purchase products or materials with recycled content when those products or materials are available at reasonable prices within a reasonable period of time unless the products or materials fail to meet reasonable performance standards.

Section 4 DEFINITIONS

- A. The following terms defined in this section shall have the meanings set forth below whenever they appear in this policy:
1. "Addendum" is a written document used during the procurement process to expand or more fully explain the terms of a solicitation instrument (Invitation to Bid or Request for Proposals). An addendum is not to be confused with a contract "amendment."
 2. "Agreement/Contract" means all types of Leon County agreements, regardless of what they may be called, for the purchase or disposal of supplies, services, materials, equipment, or construction and which name the terms and obligations of the business transaction.
 3. "Amendment" means an agreed addition to, deletion from, correction, or modification of a document or contract.
 4. "Bidder/Proposer/Offeror" is any individual, partnership, firm, or corporation, acting directly or through a duly authorized representative, sole proprietor, joint venture, or any other legal entity, who submits a bid or proposal for the goods or services contemplated.
 5. "Blanket Purchase Order" means a purchase order issued to a vendor for an amount not to exceed the face value of the purchase order. A blanket purchase order is for the procurement of commodities or services no single item of which shall exceed the threshold for small purchases unless the appropriate method of procurement was used to generate the Blanket Purchase Order.
 6. "Board" means the Board of County Commissioners of Leon County, Florida.
 7. "Brand Name or Equivalent Specification" means a specification limited to one or more items by manufacturers' names or catalogue numbers to describe the standard of quality, performance, and other salient characteristics needed to meet the County requirements, and which provides for the submission of equivalent products.
 8. "Business" means any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture, or any other private legal entity.
 9. "Change Order" means a written order amending the scope of, or correcting errors, omissions, or discrepancies in a contract or purchase order which is signed by the Contractor and approved in accordance with authorization levels.
 10. "Commodity" means a product that the County may contract for or purchase for the use and benefit of the County. A specific item, it is different from the rendering of time and effort by a provider.
 11. "Consignment Agreement" means an agreement whereby the consignor delivers specified goods to the consignee for use or sale.
 12. "Construction" means the process of building, attaining, repairing, improving, or demolishing any public structure or building, or other public improvement of any kind to any public real property. It does not include routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property.
 13. "Continuing Contract" means a contract that allows for incremental execution using individual task orders or work orders.

14. "Contract amendment or modification" means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual action of the parties to the contract.
15. "Contract Administrator" is the Leon County employee within the County Purchasing Division responsible for oversight and monitoring of contracts.
16. "Contract Manager" is the Leon County employee responsible for managing the contract, approving payment requests and invoices, and handling payment disputes.
17. "Contractor" means any person having a contract with Leon County (not to include employment contracts).
18. "Contractual Services" means the rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors, and such services may include, but are not limited to, evaluations; consultations; maintenance; accounting; security; management systems; management consulting; educational training programs; research and development studies or reports on the findings of consultants engaged there under; and professional, technical, and social services.
19. "Contractual Services Contract" is a contract for a contractor's time and effort rather than the furnishing of specific commodities. Satisfactory completion of the service and/or a specified period of time or date completes such contract.
20. "Cooperative Purchasing" is procurement conducted by, or on behalf of, more than one public procurement unit.
21. "Cost Analysis" is the evaluation of cost data for the purpose of arriving at costs actually incurred or estimates of costs to be incurred, prices to be paid, and costs to be reimbursed.
22. "Data" means recorded information, regardless of form or characteristic.
23. "Definite Quantity Contract" is a contract whereby the contractor(s) agrees to furnish a specific quantity of an item or items at a specified price and time to specified locations. Delivery by the vendor and acceptance of the specific quantity by the County completes such contract.
24. "Designee" means a duly authorized representative of a person holding a superior position.
25. "Emergency" means when there exists a threat to public health, welfare, or safety; natural or unnatural, unexpected events; accidents; or loss to the County under emergency conditions which shall be considered to mean those situations where the operation of a department or division would be seriously impaired if immediate action were not taken.
26. "Emergency Purchase" is a purchase necessitated by a sudden unexpected turn of events (e.g. acts of God, riots, fires, floods, accidents or any circumstances or cause beyond the control of agency in the normal conduct of its business) where the delay incident to competitive bidding would be detrimental to the interests of the County.
27. "Employee" means an individual drawing a salary from Leon County, whether elected or non-elected. For the purposes of this policy, it also means that any non-compensated individual performing personal services for Leon County is to be governed by these rules.
28. "Established Catalog Price" is the price included in a catalog, price list, schedule, or other form that:
 - a) is regularly maintained by a manufacturer or contractor.

- b) is either published or otherwise available for inspection by customers; and
 - c) states prices at which sales are currently or were last made to a significant number of any category of buyers or those buyers constituting the general buying public for the supplies or services involved.
29. "Gratuity" is a payment, loan, subscription, advance, deposit of money, service, or anything of more than nominal value, present or promised, inuring to the benefit of an employee, unless consideration of substantially equal or greater value is given by the employee.
30. "Home Office" is a business's principal office or headquarters constituting the center for administration and policymaking.
31. "Informal Sealed Bid" is a written solicitation method used by the County for securing prices and selecting a provider of commodities or services with a value within the threshold for this category.
32. "Intended Decision" means a written notice that states the firm or firms to whom the County intends to award a contract resulting from a solicitation and which establishes the period in which a notice of intent to protest may be timely filed. The Intended Decision is posted on the County website and on the Public Notice board in the Purchasing Division.
33. "Invitation for Bid" means a written solicitation for sealed competitive bids used for the procurement of a commodity, group of commodities, or services valued more than the threshold for this category. The invitation for bids is used when the County is capable of specifically defining the scope of work for which a contractual service is required or when the County is capable of establishing precise specifications defining the actual commodity or group of commodities required.
34. "Invitation to Negotiate" (ITN) means a solicitation which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the agency may negotiate in order to receive the best value.
35. "Joint Venture" means:
- a) A combination of contractors performing a specific job in which business enterprises participate and share a percentage of the net profit or loss; or
 - b) A joint business association of a minority individual(s)/firm(s) as defined herein, and a non-minority individual(s)/firm(s) to carry out a single business enterprise for which purpose the individuals/firms combine their property, money, efforts, skills and/or knowledge.
36. "Local Business" means a business which:
- a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six months immediately prior to the issuance of the request for competitive bids or request for proposals by the county; and
 - b) Is the principal offeror who is a single offeror; a business that is the prime contractor and not a subcontractor; or a partner or joint venture submitting an offer in conjunction with other businesses.
37. "Manufacturer" means a person or firm engaged in the process of making, fabricating, constructing, forming, or assembling a product(s) from raw, unfinished, semi-finished, finished, or recycled materials through a direct contract/agreement on behalf of the general contractor.

38. "Minor Irregularity means a variation from solicitation terms and conditions which does not affect the price of the solicitation of the quality of services sought, give the bidder/proposer an unfair advantage over other bidders/proposers, or adversely impact the interests of the County.
39. "Option to Renew" means a contract clause that allows a party to reinstate the contract for an additional term.
40. "Person" means any business, individual, committee, club, other organization, or group of individuals.
41. "Pre-Bid Conference" (or Pre-Proposal Conference) means a meeting held with prospective bidders prior to solicitation of or the date for receipt of bids or proposals, to recognize state of the art limits, technical aspects, specifications, and standards relative to the subject, and to elicit expertise and bidders' interest in submitting a bid or pursuing the task.
42. "Procurement Award" is an award of a contract for goods or services resulting from a solicitation through action by the Board of County Commissioners in a public meeting.
43. "Professional Services" means those services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined by the State of Florida, or those performed by any architect, professional engineer, landscape architect, or registered land surveyor in connection with his professional employment or practice.
44. "Project Manager" is the Leon County employee responsible for managing the obligations and technical scope of the project.
45. "Purchase Order" means that document used by Leon County to request that a contract be entered into for a specified need, and may include, but not be limited to, the technical description of the requested item, delivery schedule, transportation, criteria for evaluation, payment terms, and other specifications.
46. "Purchasing" means buying, procuring, renting, leasing, or otherwise acquiring any materials, supplies, services, construction, or equipment. It also includes all functions that pertain to the obtaining of any material, supplies, services, construction, and equipment, including description of specifications and requirements, selection and solicitation of resources, preparation, and award of contract.
47. "Purchasing Card (P-Card)" means a Commercial Card that allows organizations to take advantage of the existing credit card infrastructure to make electronic payments for a variety of business expenses.
48. "Purchasing Director" means the Leon County employee duly authorized to enter into and administer contracts and make written determinations with respect thereto under the terms of the purchasing policies of the Leon County Government.
49. "Purchasing Quotes" is the procedure used to purchase commodities or contractual services which cost within the range authorized for purchasing quotes in Section 6, shall require competitive quotations from three or more vendors. The quotations may be obtained by the operating department/division or the Purchasing Division and shall be reviewed by the Purchasing Director or designee.
50. "Recycled Content" means materials that have been recycled and are contained in the products or materials to be procured, including, but not limited to, paper, plastic, aluminum, glass, and composed materials. The term does not include internally generated scrap that is commonly used in industrial or manufacturing processes or waste or scrap purchased from another manufacturer who manufactures the same or a closely related product.

51. "Regulation" means a statement by the Board of County Commissioners having general or particular applicability and future effect, designed to implement, interpret, or prescribe law, policy, or practice.
52. "Request for Information" means a written or electronically posted request to vendors for information concerning commodities or contractual services. Responses to these requests are not offers and may not be accepted to form a binding contract.
53. "Request for Proposals" (RFP) means a written solicitation for sealed proposals with the title, date, and hour of public opening designated. The request for proposals may be used when the County is unable to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required, when the qualifications and quality of service are considered the primary factors instead of price, and when the County is requesting that a qualified offeror propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document.
54. "Request for a Quote" means a solicitation that calls for pricing information for purposes of competitively selecting and procuring commodities and contractual services from qualified or registered vendors.
55. "Responsible bidder or offeror" means a person who has the capability, in all respects, to perform fully the contract requirements, and the integrity and reliability, which will assure good faith performance.
56. "Responsive bidder or offeror" means a person who has submitted a bid, which conforms in all material respects to the Invitation to Bid or the Request for Proposals.
57. "Revenue Generating Contract" means a contract where revenue is received for goods and services provided on behalf of governmental entities.
58. "Services" means the furnishing of labor, time, or effort by a contractor, not involving the delivery of a specific end product other than those which is not defined as supplies, and which are merely incidental to the required performance. This term shall not include employment agreements or collective bargaining agreements.
59. "Service Contract" means a written contract for the performance of services over a fixed period of time or for a specified duration.
60. "Small Business Enterprise" means a firm whose SBE certification is recognized, effective, and accepted by the MWSBE Division of the Office of Economic Vitality.
61. "Small Purchases" means the procurement of commodities or services with a value within the thresholds set for this category without the requirement of quotes, bids, or public notice under procedures established by the Purchasing Division.
62. "Single Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from one available practical source of supply because of standardization, warranty, or other factors, including, but not limited to, the continuation of previous Services or additional service even though other competitive sources may be available. A Single Source may be declared such by Leon County for reasons acceptable to it.
63. "Sole Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from only one available practical source of supply because of an inability to obtain competition, proprietary technology, copyright, or a supplier's unique capability. A Sole Source may be declared such by Leon County for reasons acceptable to it.
64. "Specification" means any description of the physical or functional characteristics of the nature of a material, supply, service, construction, or equipment item. It may include a description of any requirement

for inspection, testing, recycled, or degradable materials content, or preparing a material, supply, service, construction, or equipment item for delivery.

65. "Supplier" means a person or firm who engages in the selling of materials and supplies to contractors, subcontractors, and/or manufacturers for the purpose of constructing, repairing, altering, remodeling, adding to or subtracting from or improving any building, structure, or property through a direct contract/agreement on behalf of the general contractor.
66. "Tangible Personal Property" is defined as property which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment.
67. "Term Contract" means indefinite quantity contract whereby a contractor(s) agrees to furnish an item or items during a prescribed period of time (such as 3, 6, 9, 12 months or a specific date). The specified period of time or date completes such contract.
68. "Tie (Identical) Bid" is when two or more bids are equal with respect to price, and it appears that the quality and service offered by the vendors are otherwise comparable.
69. "Tourism Event Hosting Application/Request/Bid" means the process utilized by the Tourism Department when applying to organizations to host tourism events.

Section 5 AUTHORITY OF PURCHASING DIRECTOR

- A. The Purchasing Director shall serve as the central purchasing officer of Leon County.
- B. The Purchasing Director shall develop and administer operational procedures implementing this policy and for governing the internal functions of the Division of Purchasing.
- C. Except as otherwise specifically provided in this policy, the Purchasing Director, or his/her designee, shall, in accordance with regulations promulgated by the Leon County Government:
 1. Purchase or supervise the purchase of all supplies, services, materials, equipment, and construction services defined within the scope of this policy.
 2. Operate a central warehouse for the purchasing, in bulk, of items that may be more economically bought and distributed than when purchased on an individual basis; and, to provide facilities for storage of critically needed supplies.
 3. Administer the County Purchasing Card Program.
 4. Administer the Property Control Program.
 5. Amend Purchasing Policy.
- D. Upon the prior approval of the County Administrator or designee, the Purchasing Director may delegate authority vested in the Purchasing Director to subordinate purchasing employees or other county staff when deemed necessary by the Purchasing Director, provided such staff shall comply with all applicable laws, rules and procedures established by the county.
- E. The Purchasing Director shall coordinate with the Tallahassee-Leon County Office of Economic Vitality, Office of Minority, Women, and Small Business Enterprise, to implement, monitor, and enforce the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy.

Section 6 PURCHASING CATEGORIES; THRESHOLD AMOUNTS

Table 1 Purchasing Process Thresholds

Procurement Method	Threshold
Small Purchase Procedures (Section 6.01) Tangible Property/Controlled Asset Consumables Warehouse Operations (Section 6.01.1)	\$1 to \$1,000 \$1 to \$3,500 \$1 to \$7,000
Purchasing Quotes (Section 6.02)	\$3,500.01 to \$50,000
Bid - Informal Bid Process – Standard (Section 6.03)	\$50,000.01 to \$100,000
Bid – Informal Bid Process for Small Business Enterprise Program (Section 6.03.1)	\$50,000.01 to \$300,000
Bid – Informal Bid Process for Tenant Renovations/ Improvements to County Space Leased by Private Entities (Section 6.03.2)	\$50,000.01 to \$200,000
Competitive Sealed Solicitations (Section 6.08)	\$100,000.01 and above
Blanket Purchase Orders (Section 6.07) Non-contractual Basis Contractual Basis	not to exceed \$10,000 not to exceed annual contract value

Table 2 Contract Award and Signature Authority Thresholds

Individual	Threshold*
Purchasing Director	Procurement Agreements up to \$125,000
County Administrator	Procurement Agreements up to \$250,000 and employee benefits Agreements**
Board of County Commissioners	Procurement Agreements greater than \$250,000
<p><i>*All contracts will be in a form approved by the County Attorney’s Office prior to execution. Term contracts will be awarded based upon the value of the initial term of the contract.</i></p> <p><i>**Signature Authority shall be limited to new benefits programs provided at no cost to the County and the execution of employee benefits agreements with existing providers, subject to available funding authorized by the Board.</i></p>	

Section 6.01 SMALL PURCHASES

The purchase of commodities, equipment, and services, which cost less than the threshold authorized in Section 6, does not require solicitation of quotes or bids. Small purchases shall be authorized by Department or Division heads or their designees. Small purchase thresholds are to be determined utilizing the definitions below. Specific questions should be referred to the Purchasing Division for final decisions as to the determination of the category to be utilized. Small Purchases should be procured using a Purchasing Card (P-Card) if the purchase is allowable under Leon County Purchasing Card Policy No. 00-07.

- A. Tangible Property/Controlled Asset - Items/Assets that require a property tag and inclusion on the County inventory. ALL Tangible Property must be procured via a purchase order pursuant to the Tangible Personal Property Policy No. 02-5. For purposes of this section tangible property/controlled asset includes the following:

1. An item which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment; and
2. An item with a historical cost less than \$1,000 but has been identified as being particularly at risk or vulnerable to loss or theft and having a residual value when approaching its end of shelf life by the Purchasing Director and the appropriate Division Director. Examples include computers, laptops, iPads, certain types of IT equipment, and certain types of maintenance equipment.

B. Consumables – Commodities and services that are not included in the Tangible Property/Controlled Asset description above. These items are generally assumed to be consumed during use, have little to no residual value when wear-out is achieved/reached, intended to be used up and then replaced, or used up very quickly. Some examples include writing instruments, fuel, filters, most items of clothing, paper products, food, and some replaceable hand tools such as shovels, rakes, etc.

Section 6.01.1 WAREHOUSE OPERATIONS

The purchase of commodities, materials, and equipment for warehouse inventory, which cost less than the threshold authorized in Section 6, does not require solicitation of quotes or bids. Use of economic indices, review of costs, market trends, and/or use of periodic quotations shall be used by staff to assure cost effective purchases.

Section 6.02 PURCHASING QUOTES

The purchase of goods and services, which cost within the range authorized for purchasing quotes in Section 6, shall require competitive quotations from three or more vendors. The quotations may be obtained by the operating department/division or the Purchasing Division and shall be reviewed by the Purchasing Director, or designee. Quotes must be on company letterhead, quote forms, or in a similar format with a date and signature of an authorized representative of the vendor.

Section 6.03 INFORMAL BIDS

For purchases within the cost range authorized for informal bids in Section 6, the Purchasing Director or designee shall request a minimum of three sealed bids, which shall be the result of written specifications transmitted via normal Invitation to Bid procedures. Informal Bids do not require public advertising or public access. The bids shall be opened at a predetermined time and date. Responsive bids shall be reviewed, and a written recommendation of award shall be prepared for review and action.

Section 6.03.1 INFORMAL BIDS FOR SMALL BUSINESS ENTERPRISE PROGRAM RESERVED PROJECTS

Where feasible, the County may reserve projects within the cost range authorized for informal bids for small business enterprises in Section 6. All procedures in Section 6.04 shall be followed.

Section 6.03.2 INFORMAL BIDS FOR TENANT RENOVATIONS AND IMPROVEMENTS FOR LEASED SPACE

For purchases for tenant renovations/improvements for County-owned spaces leased to private entities and within the cost range authorized for informal bids for lease space in Section 6, all procedures in Section 6.04 shall be followed.

Section 6.04 SINGLE AND SOLE SOURCE PURCHASES

- A. **Single/Sole Source Certification.** A contract may be awarded, except as otherwise provided for under state law, for a supply, service, material, equipment or construction item(s) without competition when the Purchasing Director, certifies in writing, after conducting a good faith review of available sources, that there is only one available source for the required material, supply, service, equipment, or construction item(s). Awards exceeding the Signatory Authority Threshold established for the Purchasing Director in Section 6 shall require the concurrence of the County Administrator or designee. Such awards will be made within the authorized procurement limits identified in Section 6. When a purchase exceeds the threshold amount for County Administrator approval, the item will be placed on the agenda for Board approval and certification that the vendor has been determined to be a single or sole source.
- B. **Additional Purchases from Certified Single/Sole Source.** The Purchasing Director shall be authorized, after initial single/sole source certification, to make additional purchases from a sole source vendor for a maximum of three years or until such time as contrary evidence is presented regarding sole source eligibility.

Section 6.05 EMERGENCY PURCHASES

- A. **Authorization During Normal Business Hours.** In the case of emergencies that require the immediate purchase of goods, equipment or services, the County Administrator, Purchasing Director, Group Director, or his designee shall be empowered to secure such goods or services without competitive bidding. In this event, all measures reasonably possible under the circumstances shall be taken to assure the maximum cost benefit to the County of the goods or services procured.
- B. **Authorization Outside of Normal Business Hours.** A department or division head, during non-business hours, is authorized to make purchases without competitive bids, when an emergency arises.
- C. **Documentation and Approval.** Documentation for emergency purchases pertaining to Section 6.06 (A) and (B) shall be submitted to the Purchasing Office on the standard requisition form with a detailed explanation, and support material attached, if applicable, within 10 workdays after the event occurred. Emergency purchases that exceed the competitive sealed bid threshold shall be ratified by the Board. Emergency purchases within the informal bid thresholds shall be approved by the County Administrator after-the-fact.
- D. **Mutual Aid Agreements.** The County may enter into and utilize Mutual Aid Agreements as provided in Chapter 252, Florida Statutes in the event of emergency situations. The Purchasing Director shall be authorized to invoke the terms of the Mutual Aid Agreement.

Section 6.06 COOPERATIVE PURCHASING

The County may take advantage of cooperative purchasing agreements identified below when it is in the best interest of the County as determined by the award thresholds in Section 6. Whenever practicable, vendors will be encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the contracting process, when available. (Please see Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy).

- A. **State Contracts.** The County is authorized to purchase goods or services from authorized vendors listed on the respective state contracts (state term continuing supply contracts, SNAPS agreements [State Negotiated Agreement Price Schedules], agreements resulting from Invitations to Negotiate [ITN], or other such contracts authorized by statute for use by local governments) of the Florida Department of Management Services or other

state agencies. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.

- B. Federal Supply Service. The County is authorized to purchase goods or services from authorized vendors listed on the eligible Federal Supply Schedules issued by the Federal General Services Administration. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.
- C. Collaborative Purchases with Other Public Procurement Units. The Purchasing Director, or designee shall have the authority to join with other units of government in cooperative purchasing ventures when the best interest of the County would be served thereby, and the same is in accordance with the County and State law. The Purchasing Director, or designee shall appropriately document such cooperative purchasing arrangements. All Cooperative Purchasing conducted under this section shall be through contracts awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.
- D. Other Governmental Entity Contracts (“Piggybacks”). The County is authorized to purchase goods or services from authorized vendors listed on eligible contracts of other governmental entities. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.
- E. Cooperative Purchasing Organizations. The County authorized to purchase goods or services from authorized vendors listed on eligible contracts of cooperative purchasing organizations. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy.

Section 6.07 BLANKET PURCHASE ORDERS

Blanket Purchase Orders of either type listed below shall not be used to purchase any tangible personal property item. Tangible personal property items shall be listed as individual line items on a purchase order.

- A. Non-contractual Basis - All purchases made with a non-contractual blanket purchase order shall follow the thresholds and requirements for competitive selection. No purchase order shall be issued for an amount greater than the limit established for a non-contractual blanket purchase order in Section 6 of this policy for the purchase of goods or services not under a contractual arrangement authorized under this purchasing policy or approved by the Board.
- B. Contractual Basis - No purchase order shall be issued for an amount greater than the limit established for a contractual blanket purchase order in Section 6 of this policy for the purchase of goods or services unless approved by the Board.

Section 6.08 COMPETITIVE PROCUREMENTS

A. General Conditions for all Competitive Procurements.

1. All competitive procurements are to be prepared by the Purchasing Division in conjunction with issuing department, who will provide input on the scope of the commodities, equipment or services needed, the legal ads, dates, vendor lists, and other pertinent information as may be required by the Purchasing Division.
2. Prohibited Communications

Any form of communication, except for written correspondence with the Purchasing Division requesting clarification or asking questions, shall be prohibited regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between:

- a. Any person or person's representative seeking an award from such competitive solicitation; and
- b. Any County Commissioner or Commissioner's staff, or any county employee authorized to act on behalf of the Commission to award a particular contract.

For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.

The prohibited communication shall be in effect as of the release of the competitive solicitation and terminate at the time the Board, or a County department authorized to act on behalf of the Board, awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.

The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, contract negotiations during any public meetings, presentations made to the Board, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between any employee and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and any employee, communications with the County Attorney or communications with the Purchasing Director.

Prohibited communications may result in disqualification from the particular request for proposal, request for qualification, bid, or any other competitive solicitation and shall be grounds for suspension from doing business with the County.

3. Human Trafficking language shall be incorporated into the Invitation to Bid requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.
4. Public Notice.
 - a. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$200,000 shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least 21 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$500,000 shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least once 30 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. Bids or proposals shall be received and opened at the location, date, and time established in the bid or proposal advertisement. In cases of emergency, the procedures required in this section may be altered by the County in any manner that is reasonable under the emergency circumstances.

The solicitation of competitive bids for work on roads shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least once each week for two consecutive weeks.

- b. Changes to Public Notice. If the location, date, or time of the bid opening changes, written notice of the change shall be given in the form of an addendum, as soon as practicable after the change is made and posted on the Purchasing website.
- c. Each invitation to bid, request for proposals, request for qualifications, or other procurement solicitation which is anticipated to include travel expenses by authorized persons as defined in the Leon County Travel Policy shall include the following notice:

“Consultant travel which is not covered within the scope of the consultant’s contract, and which is billed separately to the County on a cost reimbursement basis must receive prior approval and will be reimbursed in accordance with the Leon County Travel Policy. Travel expenses shall be limited to those expenses necessarily incurred in the performance of a public purpose authorized by law to be performed by the Leon County Government and must be within limitations described herein and in Ch. 112.06, Florida Statutes. Consultants and contractors, traveling on a cost reimbursement basis, must have their travel authorized by the department head from whose budget the travel expenses will be paid and the County Administrator.”

- 5. Bid Opening. Bids shall be opened publicly. At least one representative from the Division of Purchasing shall open the bids in the presence of one or more witnesses at the time and place designated in the Invitation to Bid. The amount of each bid, and such other relevant information as may be deemed appropriate by the Purchasing Director, together with the name of each bidder, and all witnesses shall be recorded. The record (Tabulation Sheet) and each bid shall be open to public inspection as provided by law.
- 6. Bid Acceptance and Evaluation. Bids shall be unconditionally accepted without alteration or correction, except as authorized in this Policy. Bids shall be evaluated based on the requirements set forth in the Invitation to Bid, which may include, but not be limited to criteria to determine acceptability such as: inspection, testing, quality, recycled or degradable materials content, workmanship, delivery, and suitability for a particular purpose and/or factors to determine a bidder’s level of responsibility such as references, work history, bonding capacity, licensure, certifications, etc. Those criteria that will affect the bid price and that are to be considered in evaluation for award shall be objectively measured, such as discounts, transportation costs, and total or life cycle costs. No criteria may be used in bid evaluation that is not set forth in the Invitation to Bid, in regulations, or in this policy.
- 7. Bid Agenda Item/Award Memo. The Tabulation Sheet and other solicitation documents, as necessary, shall be presented to the appropriate department or division head for review and recommendation. The department or division head shall prepare the recommendation in the appropriate format to the awarding authority as prescribed in Section 6.
- 8. Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids, before or after award, or cancellation of awards or contracts based on such bid mistakes, shall be permitted where appropriate under the sole discretion of the County. Mistakes discovered before bid opening may be modified or withdrawn prior to the time set for bid opening. After bid opening, corrections in bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence that a mistake of a non-judgmental character was made, the nature of the mistake, and the bid price actually intended. After bid opening, no changes in bid price or other provisions of bids prejudicial to the interest of the County or fair

competition shall be permitted. In lieu of bid correction, a low bidder alleging a material mistake of fact may be permitted to withdraw its bid if:

- a. the mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident; or
 - b. the bidder submits evidence that clearly and convincingly demonstrates that a mistake was made. All decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes shall be supported by a written determination made by the Purchasing Director and concurred with by the County Administrator.
9. Cancellation of Solicitations. Any solicitation may be canceled, or any or all responses may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director in consultation with the County Administrator or designee. Notice of cancellation shall be provided to all plan-holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.
10. Disqualification of Vendors. For any specific bid, vendors may be disqualified by the Purchasing Director, or designee for the following reasons:
- a. Failure to materially perform according to contract provisions on prior contracts with the County.
 - b. Conviction in a court of law of any criminal offense in connection with the conduct of business.
 - c. Clear and convincing evidence of a violation of any federal or state anti-trust law based on the submission of bids or proposals, or the awarding of contracts.
 - d. Clear and convincing evidence that the vendor has attempted to give a Board employee a gratuity of any kind for the purpose of influencing a recommendation or decision in connection with any part of the Board's purchasing activity.
 - e. Failure to execute a Public Entity Crimes Statement as required by Florida Statutes Chapter 287.133(3)(a).
 - f. Other reasons deemed appropriate by the Board of County Commissioners.
11. Negotiation of Terms and Conditions – Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, or all bids received exceed the available budget identified for the commodity or contractual service, the Purchasing Director or designee may negotiate on the best terms and conditions. The Purchasing Director or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations. Award will be made according to the award thresholds in Section 6.
12. Local Preference.
- a. In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures in which pricing is

the major consideration, if applicable, the County may give a preference to Local Businesses in making such purchase or awarding such contract, as follows:

- i. Individuals or firms which have their home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent of the bid price.
 - ii. Individuals or firms which do not have their home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent of the bid price.
 - iii. The maximum cost differential shall not exceed \$20,000.00. Total bid price shall include the base bid and all alternatives or options to the base bids, which are part of the bid and being recommended for award by the appropriate authority.
- b. Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a "Local Business."
- c. Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator or designee.

(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)

13. Notice of Intended Decision. The Intended Decision shall be posted on the County procurement website and on the public notice board in the Purchasing Division. This written notice shall state the firm or firms to whom the County intends to award the contract resulting from the solicitation and establishes the 72 consecutive hour period in which a notice of intent to protest may be timely filed.
14. Notice of Right to Protest. Any competitive award recommendation may be protested if the recommendation is alleged to be contrary to the County's rules or policies, the solicitation specifications, or, or law. The standard of proof for such proceedings shall be whether the action is clearly erroneous, contrary to competition, arbitrary or capricious. Such notice of intent of bid protest shall be delivered to the Purchasing Director within 72 consecutive hours after posting of the Notice of Intended Decision of Award (excluding Saturdays, Sundays, and County holidays). Protestor shall file thereafter a formal written bid challenge within five (5) business days after the date in which the notice of intent of bid protest has been submitted. Any vendor who is deemed non-responsive to the competitive procurement does not have standing to file a protest. Furthermore, vendors who would not be awarded the subject contract, even if the protest were successful, lack standing. Failure to timely file a notice of intent of bid protest or failure to timely file a formal written bid protest with the proper bond shall constitute a waiver of all rights provided under the Leon County Purchasing Policy.

Section 6.08.1 INVITATION TO BID

The invitation to bid should be utilized when the County is capable of establishing precise specifications for a commodity or defining, with specificity, a scope of services for the commodities or contractual services sought. Through this process, vendors are able to compete on a cost basis for like items or services. The selection will be based upon the lowest priced, responsive, and responsible bidder.

An invitation to bid shall be issued and shall include specifications, all contractual terms and conditions, and the place, date, and time for opening or submittal. All interpretations or corrections shall be issued as addenda. The County shall not be responsible for oral clarifications or representations.

1. Alternate(s). Alternate bids will not be considered unless authorized by and defined in the invitation to bid or addenda thereto.
2. Award. The contract shall be awarded with reasonable promptness to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the invitation to bid. The County reserves the right to waive any minor irregularity in bids and to make an award in whole or in part when either or both conditions are in the best interest of Leon County. The contract shall be awarded by purchase order or other written notice. Every procurement of contractual services shall be evidenced by a written agreement.
3. Multi-Step Sealed Bidding. When it is considered impractical to initially prepare a purchase description to support an award based on price, an invitation for bids may be issued requesting the submission of unpriced offers to be followed by an invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation.

A multi-step process utilizing pre-qualification of bidders may be used to ensure that the bidders have the appropriate licensure, capacity, qualifications, experience, staffing, equipment, bonding, insurance and similar project-based criteria to successfully perform a specific project or service. Those bidders determined qualified in the pre-qualification will then be eligible to participate in the invitation to bid process for the project or service. The Purchasing Director shall develop and administer operational procedures governing any such pre-qualification process.

Section 6.08.2 REQUEST FOR PROPOSALS

Requests for proposals are used when the scope of work, specifications, or contractual terms and conditions cannot be well defined. Evaluation of a response is based on prior established criteria which involves more than price. A request for proposals includes, but is not limited to, applicable laws and rules, functional or general specifications, statement of work, proposal instructions, and evaluation criteria.

- A. Conditions for Use. When the Director of Purchasing determines that the use of an Invitation to Bid is either not practical or not advantageous to the County, a contract may be entered into by the use of competitive sealed proposals.
- B. Consultant's Competitive Negotiation Act. Professional services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined under the Consultant's Competitive Negotiation Act (Section 287.055, Florida Statutes), shall be secured under the provisions of Section 6.08.3.
- C. Public Notice. Adequate public notice of the Request for Proposals shall be given in the same manner as provided in Section 6.08 (A)(4) of this policy for competitive procurements.

- D. Evaluation Factors. The Request for Proposals shall state the relative importance of objective criteria outlined in the scope of services, fee proposal, and other evaluation criteria.
- E. Proposal Cancellation or Postponement. The Director of Purchasing or designee may, prior to a proposal opening, elect to cancel or postpone the date and/or time for proposal opening or submission.
- F. Revisions and Discussions with Responsible Offerors. Discussions may be conducted with responsible offerors who submit proposals determined to be qualified of being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining the best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing offerors.
- G. Award. Award shall be made to the responsive, responsible offeror whose proposal is determined in writing to be the most advantageous to Leon County, taking into consideration the evaluation factors set forth in the Request for Proposals. No other factors or criteria shall be used in the evaluation criteria that are not included in the Request for Proposal. The County reserves the right to waive any minor irregularity in proposals and to make an award in whole or in part when either or both conditions are in the best interest of Leon County

Section 6.08.3 REQUEST FOR PROPOSALS FOR PROFESSIONAL ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL, AND LAND SURVEYING SERVICES

- A. Purpose. The purpose of this section, and the procedures established hereunder, is to ensure compliance with Section 287.055 Florida Statutes, known as the Consultants Competitive Negotiation Act (CCNA). This act establishes parameters within which the County must select professional services from architects, engineers, landscape architects, surveyors, and mappers. The CCNA requires the County to select these services on a qualitative basis using prescribed criteria prior to any negotiations, which may consider the cost of such services.
- B. Public Announcement. It is the policy of the County to publicly announce all requirements for professional architectural, engineering, landscape architectural, land surveying, and mapping services, and to negotiate such contracts on the basis of demonstrated competence and qualifications at fair and reasonable prices. In the procurement of such services, the Purchasing Director may require firms to submit a statement of qualifications, performance data, and other information related to the performance of professional services.
 - 1. Scope of Project Requirements.
 - a) For specific projects, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) the objectives of the study or service;
 - 3) estimated period of time needed for the service or the study;
 - 4) the estimated cost of the service or study;
 - 5) whether the proposed study or service would or would not duplicate any prior or existing study or service; and
 - 6) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.

- b) For Continuing Supply Services, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) estimated period of time needed for the service or the study;
 - 3) the estimated cost of the service or study;
 - 4) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.
2. Review of Project Requirements. The Purchasing Director or his/her designee shall review the scope of project requirements and prepare a draft request for proposals. The draft RFP shall be submitted to the requesting office for consideration and revision, as may be needed, prior to public distribution of the RFP.
3. Distribution of RFP. The Purchasing Director shall distribute the RFP in accord with standard procedures including publication of legal notice and provide notification of the date and time when such proposals are due. Public notice shall be as provided in Section 6.08 (A)(4).
4. Modification Prohibition. After the publicized submission time and date, any proposal received shall not be modified or allowed to be modified in any manner except for correction of clerical errors or other similar minor irregularities as may be allowed by the Purchasing Director or the Selection Committee (defined in Section 6.08.3(C) at any point in the process prior to contract negotiations.
5. Reuse of Existing Plans. There shall be no public notice requirements or utilization of the selection process as provided in this section for projects in which the County is able to reuse existing plans from a prior project. However, public notice of any plans, which are intended to be reused at some future time, shall contain a statement that provides that the plans are subject to reuse.
6. Exemptions. This section shall not apply to a professional service contract for a project where the basic construction cost is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or for a planning or study activity when the fee for professional services is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or in cases of valid public emergency so certified by the County Administrator. This section shall not apply to any requirement for professional services if a continuing contract is in effect and a determination is made to utilize the continuing contract to obtain such services.

C. CCNA Evaluation Committee Membership and Evaluation.

1. Depending on the expected complexity and expense of the professional services to be contracted, the County Administrator, or his/her designee shall determine whether a three member or five-member selection committee will best serve the needs of the County.
2. Membership of all Evaluation Committees shall be appointed by the County Administrator or his/her designee.
3. Public Meetings. In accordance with Section 286.011, Florida Statutes, all Evaluation Committee meetings subsequent to the opening of the solicitation are to be public meetings. The Chairperson shall be responsible to provide the Purchasing Division with all meeting information (date, time, location, and reason for meeting) no less than 96 hours in advance of any scheduled meeting, excluding holidays and weekends. The Purchasing Division will provide reasonable notice of all meetings, no less than 72 hours in advance of such scheduled meeting, excluding holidays and weekends, by posting a Notice of Evaluation Committee Meeting on the public notice bulletin board in the Division offices and on the Leon County procurement website. The

- Purchasing Director shall develop and implement Evaluation Committee procedures to ensure compliance with public meeting requirements.
4. Contact with the CCNA Evaluation Committee. Members of the CCNA Evaluation Committee are prohibited from discussing a project with any professional or professional firm that may submit a proposal during the procurement process, except in formal committee meetings. The conduct of the business and discussions regarding the proposals before the CCNA Evaluation Committee must be done in the public meetings only.
 5. Evaluation of Proposals. Only written responses of statements of qualifications, performance data, and other data received in the purchasing office by the publicized submission time and date shall be evaluated.
 - a) The initial ranking of proposals is determined by the average rank based upon the points given by each evaluator in the Weighted Scoring Sheet utilizing the Evaluation Criteria Matrix. The scores will be provided by the Purchasing and MWSBE Divisions for Local preference and MWBE participation, respectively.
 - b) Shortlisting. The best-qualified respondents shall be based upon the CCNA Evaluation Committee's ability to differentiate qualifications applicable to the scope and nature of the services to be performed as indicated by the ratings on the Weighted Scoring Sheet. Typically, the top three rated firms, if there are at least three responsive respondents, will be considered as the shortlisted firms, unless the County Administrator or designee, after input and discussion with the CCNA Evaluation Committee, approves adding additional firms to the shortlist.
 6. Presentations/Interviews. The CCNA Evaluation Committee may choose to conduct formal presentations/interviews with shortlisted firms prior to final ranking.
 7. Final Ranking. The CCNA Evaluation Committee shall utilize the Ordinal Process Rating System to rank the firms. The respondents shall be listed in order of preference starting at the top of the list. The list of best-qualified persons shall be forwarded to the Purchasing Director, County Administrator, or Board, as appropriate, for approval prior to beginning contract negotiations. Negotiation sequence shall be based on the order of preference.
- D. Negotiation Staff. Contract negotiations shall be conducted by the Purchasing Director or designee or by a Negotiation Committee.
1. Negotiation Committee Membership. Membership of the three-member Negotiation Committee shall consist of:
 - a) the Purchasing Director, or the designee of the Purchasing Director who shall chair the committee,
 - b) the head of the primary using department or agency, or his/her designee,
 - c) the County Attorney or designee.
 2. Negotiation. The Negotiator(s) shall negotiate a contract with the firm considered to be the most qualified to provide the services at compensation and upon terms which the Negotiator(s) determines to be fair and reasonable to the County. In making this decision, the Negotiator(s) shall take into account the estimated value, the scope, the complexity, and the professional nature of the services to be rendered. Should the Negotiator(s) be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, negotiations with that firm shall be formally terminated. The Negotiator(s) shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the Negotiator(s) shall formally terminate negotiations, and shall then undertake negotiations with the third most qualified firm. Should the Negotiator(s) be unable to negotiate a satisfactory contract with any of the selected firms, the Selection Committee shall select additional firms in order of their competence and qualifications, and the

Negotiator(s) shall continue negotiations in accordance with this section until an agreement is reached or until a determination has been made not to contract for such services.

3. Continuing Contracts. Nothing in this section (6.08.3) shall be construed to prohibit continuing contracts for professional services between a firm and the County.

Section 6.08.4 INVITATION TO NEGOTIATE

The invitation to negotiate should be utilized when the scope of the project is not clearly defined and the County has determined that negotiations may be necessary to receive the best value. The invitation shall invite vendor input on the scope, schedule, and process for initiating the project. The ITN method of procurement is frequently used in areas experiencing constant change in the marketplace and the County desires the opportunity to obtain current up-to-date goods or services at the time of contracting.

- A. Conditions for Use. When the Purchasing Division determines that the use of an Invitation to Bid (ITB) or Request for Proposal (RFP) is either not practical or not advantageous to the County, a contract may be entered into by the use of an Invitation to Negotiate (ITN). The invitation to negotiate is a solicitation which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the agency may negotiate in order to receive the best value. The invitation to negotiate should be utilized when the scope of the project is not clearly defined and the County has determined that negotiations may be necessary to receive the best value. The invitation shall invite vendor input on the scope, schedule, and process for initiating the project. The ITN method of procurement is frequently used in areas experiencing constant change in the marketplace and the County desires the opportunity to obtain current up-to-date goods or services at the time of contracting.
- B. Criteria. The criteria that will be used for determining the acceptability of the reply and guiding the selection of the vendors with which the County will negotiate must be specified. The department director shall outline the general scope of services to be addressed by the proposers. The Purchasing Division, in conjunction with the department director, shall prepare the criteria and development of the invitation to negotiate which should include, but not be limited to, the following: Introduction, Background, Evaluation Criteria, Selection Process; Required Forms, and Proposed Contract.
- C. Evaluation Committee. Depending on the expected complexity and expense of the commodity or service to be contracted, the County Administrator, or his/her designee shall determine whether a three member or five-member selection committee will best serve the needs of the County. Membership of all Evaluation Committees shall be appointed by the County Administrator or his/her designee. Members of the Evaluation Committee are prohibited from discussing a project with any firm that may submit a reply during the procurement process, except in formal committee meetings. The conduct of the business and discussions regarding the replies before the Evaluation Committee must be done in the public meetings only.
- D. Evaluation of Replies. The ranking of replies is determined by the average rank based upon the points given by each evaluator in the Weighted Scoring Sheet utilizing the Evaluation Criteria Matrix. The Evaluation Committee shall evaluate replies against all evaluation criteria set forth in the invitation to negotiate in order to establish a competitive range of replies reasonably susceptible of award.
- E. Negotiations. Contract negotiations shall be conducted by the Purchasing Director or designee. The County may select one or more vendors within the competitive range with which to commence negotiations. After negotiations

are conducted, the County shall award the contract to the responsible and responsive vendor that the County determines will provide the best value to the County, based on the selection criteria.

Section 6.09 BID PROTEST PROCEDURE

- A. Right to Protest. Subject to the limitations of Section 6.08,13, any person, hereinafter referred to as Protestor, who submits a timely response to a solicitation, under Sections 6.08.1, 6.08.2, 6.08.3, or 6.08.4 of this Policy, and who is aggrieved with an Intended Decision of the County shall have the right to protest.

Any Protestor wishing to protest an Intended Decision shall follow the procedures set forth in paragraphs B, C, and D of this section.

- B. Filing a Protest. A Protestor shall file with the County a notice of intent to protest in writing within seventy-two (72) consecutive hours (excluding Saturdays, Sundays, and County holidays) after the posting of the notice of Intended Decision. A formal written protest shall be filed within five (5) business days after the date the notice of intent to protest has been filed. Failure to timely file a notice of intent to protest or failure to file a formal written protest including the required bond, shall constitute a waiver of the right to proceedings under this section. Any bidder/proposer who is deemed non-responsive to the solicitation does not have standing to file a protest. Furthermore, bidders/proposers who would not be awarded the subject contract, even if the protest were successful, lack standing.

A notice of intent to protest and the formal written protest are deemed filed with the County when it is received by the Purchasing Division.

1. The notice of intent to protest shall contain at a minimum: the name of the Protestor; the Protestor's address and phone number; the name of the Protestor's representative to whom notices may be sent; the name and bid number of the solicitation; and, a brief factual summary of the basis of the protest.
2. The formal written protest shall: identify the Protestor and the solicitation involved; include a plain, clear statement of the grounds upon which the protest is based; refer to the statutes, laws, ordinances, or other legal authorities which the Protestor deems applicable to such grounds; and, specify the relief to which the Protestor deems him/herself entitled.
3. A formal written protest shall include the posting of a bond with the Purchasing Division at the time of filing the formal written protest, made payable to the Board of County Commissioners, Leon County, in an amount equal to three percent (3%) of the County's estimate of the total dollar amount of the contract or \$5000, whichever is greater. If after completion of the bid protest process and any court proceedings, the County prevails, the County shall be entitled to recover all court costs provided under Florida law, but in no event attorney fees, which shall be included in the final order of judgment rendered by the court. Upon payment of such court costs by the Protestor, the bond shall be returned to him/her. After completion of the bid protest process and any court proceedings, if the Protestor prevails, the protestor shall be entitled to have his bond returned and he shall be entitled to recover from the County all court costs provided under Florida law, but in no event attorney fees, lost profits or bid preparation costs, which shall be included in the final order of judgment rendered by the court. In no case will the Protestor or Intervenor be entitled to any costs incurred with the solicitation, including bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.
4. Timeliness of protest determinations. All determinations on the timeliness of notices of intent to protest and formal written protests will be made by the Purchasing Director or designee.

C. Protest of Intended Decisions.

1. Upon timely receipt of a notice of intent to protest an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and a copy of this section. The Purchasing Director shall within two (2) business days send a copy of the notice of intent to protest to all persons who responded to the subject solicitation.
2. Upon timely receipt of a formal written protest of an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and will notify the Chairman of the Procurement Appeals Board. The Purchasing Director shall within two (2) business days send a copy of the formal written protest all persons who responded to the subject solicitation.
3. Procurement Appeals Board. There is hereby established a Procurement Appeals Board to be composed of a chairperson and two members and two alternates. The chairperson, members, and alternates of the Procurement Appeals Board shall be appointed by the County Administrator. The terms of office of the chairperson, members, and alternates of the Procurement Appeals Board shall be three years. Successors shall be appointed for terms of three years, or for the balance of any unexpired term, but members may continue to serve beyond their terms until their successors are appointed. Members may be reappointed for succeeding terms.
 - a) The Attorney representing the Procurement Appeals Board is authorized to provide such administrative support as the Chairperson requests in the scheduling and hearing of formal written protests.
 - b) Acting by two or more of its members, the Procurement Appeals Board shall issue a decision in writing or take other appropriate action on each formal written protest submitted. A copy of any decision shall be provided to all parties and the Purchasing Director.
 - c) Procurement Appeals Board Proceedings
 - 1) The Procurement Appeals Board shall, unless otherwise mutually agreed upon by all parties, at the earliest of fourteen (14) business days but no later than twenty-one (21) business days of receiving notice of a formal written protest, schedule a protest proceeding and give reasonable notice to all substantially affected persons or businesses, including the Protestor, and any Intervenor. Notice of such proceeding shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, or as otherwise required by law.
 - 2) At least three (3) business days prior to the protest proceeding, the Intervenor and/or County, as the case may be, may submit to the Procurement Appeals Board a response to the arguments contained within the formal written protest.
 - 3) In the protest proceeding, the Protestor, Intervenor, and/or County as the case may be, or the representative or counsel of each, may make an oral presentation of its arguments.
 - 4) Each party shall have no more than twenty (20) minutes to present its arguments and the arguments presented shall be confined to the formal protest and/or response. The members of the Procurement Appeals Board may make whatever inquiries they deem pertinent to a determination of the protest.
 - 5) The protest proceeding shall be de novo. Any prior determinations by administrative officials shall not be final or conclusive.
 - 6) At the conclusion of the protest proceeding, the Procurement Appeals Board shall render a decision. Within seven (7) business days of rendering the decision, the

decision shall be reduced to writing and provided to the Protestor and/or Intervenor, as the case may be, and the County. The decision of the Procurement Appeals Board shall constitute final agency action.

- 7) Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

D. General Provisions

1. **Intervenor.** Any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject solicitation under Sections 6.08.1, 6.08.2, 6.08.3, or 6.08.4 of this Policy and who has a substantial interest in the Intended Decision or Procurement Award of the County, may be granted the right to intervene by order of the Chairperson of the Procurement Appeals Board in response to a petition to intervene. A petition to intervene shall be filed within three (3) business days of receiving notice of the filing of a formal written protest. Failure to timely file a petition to intervene shall constitute a waiver of all rights to intervene in the subject protest proceeding. Petitions to intervene will be considered by the Chairperson of the Procurement Appeals Board, and any decision concerning a Petition to Intervene shall be made by the Chairperson and shall be deemed final.
2. **Time Limits.** The time limits in which formal written protests shall be filed as provided herein may be altered by specific provisions in the solicitation or upon the mutual written consent of the Protestor and the County.
3. **Entitlement to Costs.** In no case will the Protestor or Intervenor be entitled to any costs incurred with the subject solicitation under Sections 6.08.1, 6.08.2, 6.08.3, or 6.08.4 including, but not limited to bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.
4. After a formal written protest has been filed with the Purchasing Director, the Protestor may not discontinue such appeal without prejudice, except as authorized by the Procurement Appeals Board.
5. **Stay of Procurement During Protests.** In the event of a timely protest under Section 6.09(B) herein, the Purchasing Director shall not proceed further with the solicitation or award of the contract until all administrative remedies have been exhausted or until the County Administrator makes a written determination that the award of a contract without delay is necessary to protect the substantial interests of the County. Additionally, the County Administrator, or designee may execute an extension of current contract(s) to ensure the continuation of critical services.

Section 7 OWNER DIRECT PURCHASES IN PUBLIC WORKS CONTRACTS

It is the policy of Leon County, Florida that all owner direct purchases for supplies and materials for use in public works projects be made in accordance with Section 212.06(6) Florida Statutes and rule 12A-1.094 Florida Administrative Code, as they may be amended from time to time.

The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of owner direct purchases for supplies and materials for use in public works projects. In addition, the Purchasing Division shall provide training for project managers and other fiscal staff involved in contracts that may utilize owner direct purchases.

Section 8 EMPLOYMENT ELIGIBILITY AND VERIFICATION

- A. State and Federal statutes and executive orders require employers to abide by the immigration laws of the United States and to employ in the United States only individuals who are eligible to work in the United States. It is the

policy of Leon County, Florida that unauthorized aliens shall not be employed nor utilized in the performance of contracted services for the County, in accordance with the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, as amended (8 U.S.C. § 1324a), and Subpart 22.18 of the Federal Acquisition Register.

B. Employment Eligibility Verification.

This section on employment eligibility verification (“E-Verify”) requirements shall apply to contractors and subcontractors providing goods or performing contracted services for the County,

1. By providing goods and/or services to the County, each Contractor and Subcontractor is obligated to comply with the provisions of Section 448.095, Florida Statutes., “Employment Eligibility.” Compliance with Section 448.095, Florida Statutes, includes, but is not limited to, utilization of the Department of Homeland Security’s E-Verify system (E-Verify) to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien.
2. Each Contractor and subcontractor must register with and use the Department of Homeland Security’s E-Verify system E-Verify Program for Employment Verification. Contractor further agrees to provide to the County, within thirty days of the effective date of this contract/amendment/extension, documentation of such enrollment in the form of a copy of the E-Verify “Edit Company Profile” screen, which contains proof of enrollment in the E-Verify Program (this page can be accessed from the “Edit Company Profile” link on the left navigation menu of the E-Verify employer’s homepage).
3. Contractor further agrees that it will require each subcontractor that performs work under this contract to provide the Contractor with an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. The Contractor shall maintain a copy of such affidavit for the duration of the contract.
4. Contractor further agrees to maintain records of its participation and compliance with the provisions of the E-Verify program, including participation by its subcontractors as provided previously, and to make such records available to the County or other authorized state entity consistent with the terms and conditions governing the use of the E-verify system.

- C. The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of this policy section. In addition, the Purchasing Division shall provide training for project managers and other staff involved in contracts that may utilize E-Verify requirements.

Section 9 CONTRACT ADMINISTRATION

The Purchasing Director or designee shall serve as the chief contract administrator for the County. The Purchasing Director shall establish administrative procedures and processes and shall acquire any tools necessary for the implementation and operation of a comprehensive contract administration program. In addition, the Purchasing Division shall provide initial contract administration training for project managers and update training as deemed necessary.

Section 9.01 CONTRACT PROVISIONS

- A. Standard Contract Clauses and Their Modification. The Purchasing Director, after consultation with the County Attorney, may establish standard contract clauses for use in County contracts. However, the Purchasing Director may, upon consultation with the County Attorney, vary any such standard contract clauses for any particular contract.

- B. **Contract Clauses.** All County contracts for supplies, services, and construction shall include provisions necessary to define the responsibilities and rights of the parties to the contract. The Purchasing Director, after consultation with the County Attorney, may propose provisions appropriate for supply, service, or construction contracts, addressing among others the following subjects:
1. the unilateral right of the County to order, in writing, changes in the work within the scope of the contract;
 2. the unilateral right of the County to order, in writing, temporary stopping of the work or delaying performance that does not alter the scope of the contract;
 3. variations occurring between estimated quantities or work in contract and actual quantities;
 4. defective pricing;
 5. time of performance and liquidated damages;
 6. specified excuses for delay or nonperformance;
 7. termination of the contract for default;
 8. termination of the contract in whole or in part for the convenience of the County;
 9. suspension of work on a construction project ordered by the County;
 10. site conditions differing from those indicated in the contract, or ordinarily encountered, except that a differing site conditions clause need not be included in a contract:
 - a) when the contract is negotiated;
 - b) when the contractor provides the site or design;
 - c) when the parties have otherwise agreed with respect to the risk of differing site conditions.
 11. value engineering proposals.

Section 9.02 CHANGE ORDERS/CONTRACT AMENDMENTS

A. **Change Orders.** Change Orders are written documentation reflecting changes made to stipulations, condition, or terms of the contract during the contract period whether the contract is a capital improvement or a consultant services contract. The purchasing categories' thresholds designated in Section 6 shall govern the appropriate level of approval. There are two types of change orders that may be made to these contracts.

1. **Field Change Order.** This change order is identified in the original approved contract as a contingency and is referred to as a field change order. It is customary in more complex contracts to include a contingency for changes to the original contract through Field Change Orders. For contracts of less than \$1,000,000, a contingency may be included generally not to exceed 10% of the contract value, unless circumstances justify same. For contracts in excess of \$1,000,000, a contingency shall be included, but shall generally not exceed 5% of the original contract value, unless circumstances justify same.

When a contract is approved with such a contingency, the Project Manager with the concurrence of the respective Department Director or designee is authorized to approve one or more Change Orders up to the aggregate monetary value of the contingency. The contract must contain an approved contingency clause for this type of Field Change Order such as "The contract price includes a 5% or 10% (whichever is applicable) contingency amount for change orders that may be authorized at the discretion of the County."

Alternately, as a part of the project award recommendation, staff may propose an alternate amount for the level of pre-approved field Change Orders based upon the known complexity of the project; the certainty of unknown

factors such as asbestos abatement or unknown conditions in rehabilitation; or other such factors for consideration by the Board.

2. Approved Change Order. Any Change Order, the cost of which exceeds the Field Change Order Threshold amount, or a Change Order which amends the scope of work or services in a significant manner, shall be considered by the County Administrator or designee. In the event a budget amendment is required, the procedures of the Office of Management and Budget shall apply to the amendment.

B. Contract Amendments. Contract amendments, other than change orders, which provide for the alteration of specifications, delivery point, time, payments, quantity, or similar provisions of a contract without changing the scope of the project, may be approved by an appropriate person based upon the dollar value of the amendment. The purchasing categories' thresholds designated in Sections 6 shall govern the appropriate level of approval.

Section 9.03 ASSIGNMENTS OF CONTRACTS

No agreement made pursuant to any section of this policy shall be assigned or sublet as a whole or in part without the written consent of the County nor shall the contractor assign any monies due or to become due to the contractor hereunder without the previous written consent of the County.

Section 10 COUNTY PROCUREMENT RECORDS

A. Procurement Files. All determinations and other records pertaining to the solicitation, award, or performance of a contract shall be maintained for the County in appropriate files by the Purchasing Director.

B. Retention of Procurement Records. All procurement records shall be retained and disposed of by the County in accordance with records retention guidelines and schedules established by the State of Florida.

Section 11 SPECIFICATIONS

Section 11.01 MAXIMUM PRACTICABLE COMPETITION

All specifications shall be drafted to promote overall economy and encourage competition in satisfying the County's needs and shall not be unduly restrictive. This policy applies to all specifications including, but not limited to, those prepared for the County by architects, engineers, designers, and draftsmen.

Section 11.02 USE OF BRAND NAME OR EQUIVALENT SPECIFICATIONS

- A. Use. Brand name or equivalent specifications may be used when the Purchasing Director determines that:
1. no other design, performance, or qualified product list is available;
 2. time does not permit the preparation of another form of purchase description, not including a brand name specification;
 3. the nature of the product or the nature of the County requirements makes use of a brand name or equivalent specification suitable for the procurement; or
 4. use of a brand name or equivalent specification is in the County's best interests.

- B. Designation of Several Brand Names. Brand name or equivalent specifications shall seek to designate three, or as many different brands as are practicable, as "or equivalent" references and shall further state that substantially equivalent products to those designated may be considered for award.
- C. Required Characteristics. Unless the purchasing agent determines that the essential characteristics of the brand names included in the specifications are commonly known in the industry or trade, brand name or equivalent specifications shall include a description of the particular design, functional, or performance characteristics required.
- D. Nonrestrictive Use of Brand Name or Equivalent Specifications. Where a brand name or equivalent specification is used in a solicitation, the solicitation shall contain explanatory language that the use of a brand name is for the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.
- E. Determination of Equivalents. Any prospective bidder may apply, in writing, for a pre-bid determination of equivalence by the Purchasing Director. If sufficient information is provided by the prospective bidder, the Purchasing Director may determine, in writing and prior to the bid opening time, that the proposed product would be equivalent to the brand name used in the solicitation.
- F. Specifications of Equivalents Required for Bid Submittal. Vendors proposing equivalent products shall include in their bid submittal the manufacturer's specifications for those products, unless directed otherwise in the bid document. Brand names and model numbers are used for identification and reference purposes only.

Section 11.03 BRAND NAME SPECIFICATIONS

- A. Use of Brand Name Specifications. Since use of a brand name specification is restrictive of product competition, it may be used only when the Purchasing Director determines that only the identified brand name item or items will satisfy the County's needs.
- B. Competition. The Purchasing Director or designee shall seek to identify sources from which the designated brand name item or items can be obtained and shall solicit such sources to achieve whatever degree of price competition is practicable. If only one source can supply the requirement, the procurement shall be made under Section 6.05, Single and Sole Source Purchases.

Section 12 ETHICS IN PUBLIC CONTRACTING

Section 12.01 CRIMINAL PENALTIES

To the extent that violations of the ethical standards of conduct set forth in this section constitute violations of the State Criminal Code they shall be punishable as provided therein. Such penalties shall be in addition to civil sanctions set forth in this part.

Section 12.02 EMPLOYEE CONFLICT OF INTEREST

- A. Participation. It shall be unethical for any County employee to participate directly or indirectly in a procurement contract when the County employee knows that:
 - 1. the County employee or any member of the County employee's immediate family (father, mother, brother, sister, child, grandparent, or grandchild of employee or spouse) has a financial interest pertaining to the procurement contract; or

2. any other person, business, or organization with whom the County employee or any member of a County employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement contract.
- B. Blind Trust. A County employee or any member of a County employee's immediate family who holds a financial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that financial interest.

Section 12.03 CONTEMPORANEOUS EMPLOYMENT PROHIBITED

It shall be unethical for any County employee who is participating directly or indirectly in the procurement process to become or to be, while such a County employee, the employee of any person contracting with the County.

Section 12.04 USE OF CONFIDENTIAL INFORMATION

It shall be unethical for any employee knowingly to use confidential information for actual or anticipated personal gain, or for the actual or anticipated personal gain of any other person.

Section 12.05 WAIVERS FROM CONTEMPORANEOUS EMPLOYMENT PROHIBITION AND OTHER CONFLICTS OF INTEREST

The County Administrator may grant a waiver from the employee conflict of interest provision or the contemporaneous employment provision upon making a written determination that:

- A. the contemporaneous employment or financial interest of the County employee has been publicly disclosed;
- B. the County employee will be able to perform his procurement functions without actual or apparent bias or favoritism; and
- C. the award will be in the best interest of the County.

Section 12.06 GRATUITIES AND KICKBACKS

- A. Gratuities. It shall be unethical for any person to offer, give, or agree to give any County employee, or for any County employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or performing in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, subcontract, or to any solicitation or proposal therefor.
- B. Kickbacks. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.
- C. Contract Clause. The prohibition against gratuities and kickbacks prescribed in this section shall be conspicuously set forth in every contract and solicitation, therefore.

Section 12.07 SANCTIONS

- A. Employee Sanctions. Upon violation of the ethical standards by an employee, the County Administrator, Purchasing Director, or other appropriate authority may:
 - 1. impose one or more appropriate disciplinary actions as defined in the County Personnel Rules and Regulations, up to and including termination of employment; and,
 - 2. may request investigation and prosecution.
- B. Non-employee Sanctions. The Board may impose any one or more of the following sanctions on a non-employee for violation of the ethical standards:
 - 1. written warnings;
 - 2. termination of contracts; or
 - 3. debarment or suspension as provided in Section 17.

Section 12.08 RECOVERY OF VALUE TRANSFERRED OR RECEIVED IN BREACH OF ETHICAL STANDARDS

- A. General Provisions. The value of anything being transferred or received in breach of the ethical standards of this policy by a County employee or a non-employee may be recovered from both County employee and non-employee.
- B.. Recovery of Kickbacks by the County. Upon a showing that a subcontractor made a kickback to a prime contractor or a higher tier subcontractor in connection with the award of a subcontract or order there under, it shall be conclusively presumed that the amount thereof was included in the price of the subcontract or order and ultimately borne by the County and will be recoverable hereunder from the recipient. In addition, that amount may also be recovered from the subcontractor making such kickback. Recovery from one offending party shall not preclude recovery from other offending parties.

Section 13 FEDERAL REQUIREMENTS

Section 13.01 PATENTS

If a contract involving research and development, experimental, or demonstration work is being funded in whole or in part by assistance from a federal agency, then the contract shall include the following provisions.

- A. Notice to Contractor. The contract shall give notice to the contractor of the applicable grantor agency requirements and regulations concerning reporting of, and rights to, any discovery or invention arising out of the contract.
- B. Notice by Contractor. The contract shall require the contractor to include a similar provision in all subcontracts involving research and development, experimental, or demonstration work.

Section 13.02 FEDERAL PUBLIC POLICY REQUIREMENTS

- A. Applicability. If a contract is being funded in whole or in part by assistance from any federal agency, either directly or as a pass-through, the contract is subject to one or more federal public policy requirements such as:
 - 1. equal employment opportunity;
 - 2. affirmative action;

3. fair labor standards;
 4. energy conservation;
 5. environmental protection; or
 6. other similar socio-economic programs.
- B. It is the policy of the Leon County Government to obtain commodities and services efficiently and effectively in free and open competition for the Federal Grant and Aid Programs (including Federal pass-through grants such as the Community Development Block Grant) through the use of sound procurement practices. All County staff and other persons (subgrantees or contractors) with designated responsibility for the administration of Federal Grant award contracts are responsible for ensuring compliance with all applicable federal and state laws and regulations. These include but are not limited to OMB Circular A-102, Attachment ; 2 CFR Part 200.317-.326; Section. 255.0525, Florida Statutes; Section 287.055, Florida Statutes; Section 290.047, Florida Statutes; Chapter 73C-23, Florida Administrative Code; and, the Purchasing Policy of Leon County, Florida and any subsequent revisions to any of the above laws, rules, and regulations.
- C. The County Purchasing Policy shall govern the procurement of commodities and services for the Federal Grant and Aid Programs except as provided in this section unless otherwise required in the grant award.
1. In the event of declaration of emergency by the Chairman of the Board, the Purchasing Policy shall be suspended, and the guidelines of Federal Regulation 2 CFR Part 200 shall be utilized, to include, but not be limited to procurement thresholds.
 2. Local Preference Program is not applicable to Federally funded programs.
 3. The Tallahassee-Leon County Office of Economic Vitality's Minority, Women, and Small Business Enterprise Policy is not applicable to Federally funded programs. Instead, the following affirmative steps shall be taken and documented to ensure that these firms are used when possible:
 - a) Place qualified small, minority, and women owned businesses on solicitation lists;
 - b) Assure that small, minority, and women owned businesses are solicited when they are potential sources;
 - c) Divide total requirement, when economically feasible, into smaller tasks or quantities to permit maximum participation by small, minority, and women owned businesses;
 - d) Establish delivery schedules, when requirements permits, which encourage participation by small, minority, and women owned business enterprises;
 - e) Use service and assistance from such organization as Small Business Administration (SBA) and the Minority Business Development Agency of the Department of Commerce; and
 - f) Require the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs a through e of this section.
 4. All procurement of commodities or services in excess of \$2,000 shall require a written agreement embodying all provisions and conditions thereof.
 5. All procurement of commodities or services in excess of \$2,000 and less than the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes may be entered into only after informal competition based on offers or quotes from not less than three (3) vendors, unless otherwise required in the grant or aid program.

6. Publication of public notice for invitations to bid or requests for proposals and notification of the solicitation through distribution to potential bidders or offerors shall be required for all procurement in excess of the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes. The time frames in section 6.08 of this policy shall apply for the required public notice.
 7. Except as may otherwise be provided by law, procurement awards shall be made only on the basis of requirements and evaluation factors related to the price or quality of the commodities or services or to the ability of the prospective supplier or contractor to perform under the agreement. In evaluating the ability of a prospective contractor to perform, the County shall at a minimum consider the prospective contractor's record of past performance under similar federal grants.
 8. Nothing herein shall prohibit the County from utilizing a single source procurement (Section 6.05, Single and Sole Source Purchases) or procurement from another unit of government (Section 6.07, Cooperative Purchasing).
- D. Notice. The Purchasing Director shall include in the contract all appropriate provisions giving the contractor notice of these requirements. Where applicable, the Purchasing Director shall include in the contract provisions the requirement that the contractor give a similar notice to all of its subcontractors.

Section 14 INSURANCE REQUIREMENTS

- A. Minimum Requirements. Contractor shall purchase and maintain such insurance as will protect it from claims under Workers' Compensation laws, disability benefit laws or other similar employee benefit plans; from claims or damages because of bodily injury, occupational sickness or disease or death of its employees and claims insured by usual personal injury liability coverage in amounts determined by the provisions of the Risk Management Policy.
- B. Certificates of Insurance. Certificates of Insurance acceptable to the County shall be filed with the Purchasing Division prior to the commencement of the work and periodically thereafter upon any renewals during the term of the contract.
- C. Change of Insurance Requirements. The Board of County Commissioners reserves the right to change the insurance requirements based on the project scope, or when determined in the best interest of the County.

Section 15 BONDS AND DEPOSITS

When any of the following bonds are required, the bond(s) will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the appropriate bond(s) is (are) accepted by the County.

Section 15.01 TYPES OF BONDS AND DEPOSITS

- A. Combination Payment and Performance Bond - This type of bond is required for repairs, renovations, new construction and public works costing in excess of \$200,000. For projects less than that amount, it may be required at the discretion of the Purchasing Director or designee. When a payment and performance bond is required, the bond will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the payment and performance bond is accepted by the County.
- B. Performance Bond - For a project of an estimated value less than \$200,000, requirement of a performance bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to ensure that a contract is carried out in accordance with the applicable specifications

and at the agreed contract price. Architectural, Engineering, Landscape Architectural, and Surveying and Mapping Services are exempt from this requirement.

- C. Payment and Material Bond - For a project of an estimated value less than \$200,000, requirement of a payment and material bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to protect the County from suits for non-payment of debts, which might be incurred by a contractor's performance for the County.
- D. Warranty Bonds - At the discretion of the Purchasing Director, after consultation with user departments, a Warranty Bond may be required from a successful bidder to ensure warranty provisions are fulfilled.
- E. Guaranty of Good Faith Deposit (Bid Deposit) - For projects estimated to be less than \$200,000, requirement of a bid bond will be at the discretion of the Purchasing Director or designee. For purchases where it is determined by the Purchasing Director to be in the best interest of the County, and projects estimated to be \$200,000 or more, bidders will be required to submit with their bid or proposal a guaranty of good faith deposit. When in the best interest of the County, it is recommended by the Purchasing Director and approved by the County Administrator or his designee, these requirements may be waived.
 - 1. Return of Bond. Such deposit may not be withdrawn until a specified time after the proposals are opened and awards made. The deposit of the bond shall be retained by the Finance Officer of the Board until the Purchasing Director is satisfied that the Contractor's obligations have been satisfactorily completed.
 - 2. Substitutes. In lieu of a surety bid bond, contractor may 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. Such deposits shall be retained by the Finance Officer of the Board until all provisions of the contract have been met.
- F. Retention of Payments. The County may require the payment for a project, or a portion thereof, be withheld until the project has been completed as a method of protecting the County's interest. Retention may also be used in lieu of the above listed bonds. The solicitation documents shall specifically state if retention of any portion or all of the payment for the project is to be done.
- G. Waiver of Bonds. When it is in the best interest of the County, the bonding requirements referenced in sections A – E above may be waived when 1) it is in the best interest of the County, and 2) it is recommended by the Purchasing Director and approved by the County Administrator or his designee.

Section 15.02 AMOUNT OF BOND OR DEPOSIT

- A. Amount of Bond. Bonds or deposits, which may be required, shall normally be in the following amounts, except as provided in the following subsection B.
 - 1. Performance Bond: 100% of contract price.
 - 2. Payment Bond: 100% of contract price.
 - 3. Payment and Performance Bond: 100% of contract price.
 - 4. Guaranty of Good Faith Deposit (Bid Deposit or Bond): The bid deposit will be 5% of the price bid by the vendor.
- B. Exceptions to Amount of Bond. Any of the previously listed bonds may be required at another amount recommended by the Purchasing Director and approved by the County Administrator or his designee when in the best interest of the County.

Section 15.03 PROCESSING OF BONDS AND DEPOSITS

- A. Responsibility for Securing Bonds. The contractor shall be responsible for securing the bond. Any costs may be included in the contract price.
- B. Licensure of Bonding Company. The company acting as surety for any bond issued shall be licensed to do business in the State of Florida
- C. Review of Bonds by County Attorney or designee. Surety bonds furnished will be reviewed by the County Attorney or designee, who shall either accept or reject it for the Board.
- D. Failure to Provide Required Bond. In the event a contractor fails to provide an acceptable bond when required, within 10 days after notification, the County Attorney will be notified. Upon the recommendation of the County Attorney, the Board may declare the contract null and void, and retain in the account of Leon County any good faith deposits or guaranty which may have been submitted as liquidated damages under the terms of the solicitation.
- E. Filing of Bonds. Bonds, when accepted, shall be forwarded to the Finance Officer of the Board and shall be filed with the applicable contract documents.
- F. Deposits. Cash deposits (cashier's check, money orders, bank drafts, etc.) of all bidders shall be forwarded to the Finance Officer of the Board for deposit to the account of the Leon County Government. Upon award of contract, the Purchasing Director or designee shall be responsible for approving the return of deposits to unsuccessful bidders.

Section 16 PAYMENT TO VENDORS

It is the policy of Leon County, Florida that payment for all purchases by the County be made in a timely manner in accordance with the provisions of the "Local Government Prompt Payment Act," Section 218.70 –.79, Florida Statutes.

The Purchasing Director, in conjunction with the Finance Director, shall establish administrative procedures, processes, and forms necessary for the implementation and administration of payments for all contracts under the requirements of the Local Government Prompt Pay Act. In addition, the Purchasing Division shall team with the Finance Department to provide accounts payable training for project managers and other fiscal staff involved in contracts and update training as deemed necessary.

Payments made via Purchasing Card (P-Card) shall meet requirements of Leon County Purchasing Card Policy No. 00-07.

Section 16.01 PAYMENT DISPUTE RESOLUTION

- A. In the event a dispute occurs between a contractor/vendor, herein referred to as vendor, and the County concerning payment of a payment request for construction work or an invoice for goods and/or services, the vendor should first attempt to resolve the issue with the Project Manager. If the dispute cannot be resolved between the vendor and the Project Manager within five (5) business days of the dispute first being raised, the vendor may file a formal payment dispute. Formal payment dispute resolution shall be finally determined by the County under this procedure in accordance with Section 218.76, Florida Statutes.
- B. Filing a Dispute. Any vendor shall file with the Contract Administrator in the County Purchasing Division a formal notice of payment dispute in writing within five (5) business days of the dispute first being raised.

1. The notice of payment dispute shall contain at a minimum: the name of the vendor; the vendor's address and phone number; the name of the vendor's representative to whom notices may be sent; the contract number associated with the payment dispute; and, a brief factual summary of the basis of the dispute.
2. Waiver. Failure to timely file a written payment dispute shall constitute a waiver of proceedings under this section.
3. Upon timely receipt of a formal payment dispute, the Contract Administrator shall provide the vendor with acknowledgement of receipt, will notify the Payment Dispute Resolution Committee, and will coordinate with all parties to establish the date and time for a Payment Dispute Resolution Proceeding.

C. General Provisions

1. Time Limits. Proceedings to resolve the dispute shall be commenced not later than 30 calendar days after the date on which the payment request or proper invoice (as specified in the contract document) was received by the County and shall be concluded by final decision of the County not later than 45 calendar days after the date on which the payment request or proper invoice was received by the County.
2. Protest. Dispute resolution procedures shall not be subject to Chapter 120, Florida Statutes, and such procedures shall not constitute an administrative proceeding, which prohibits a court from deciding de novo any action arising out of the dispute.
3. Interest. If the dispute is resolved in favor of the County, then interest charges shall begin to accrue 15 calendar days after the County's final decision. If the dispute is resolved in favor of the vendor, then interest shall begin to accrue as of the original date the payment became due.
4. Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

D. Payment Dispute Resolution Proceeding Process

1. All formal payment disputes shall be presented to the Payment Dispute Resolution Committee. The committee shall be comprised of the Contract Manager, Purchasing Director, and appropriate Division Director for the County or their designees.
2. Within three (3) business days of timely receipt of a formal notice of payment dispute, the Contract Manager shall schedule a proceeding before the Payment Dispute Resolution Committee to include all substantially affected persons or businesses, including the vendor and County Project Manager. Non-appearance by the vendor shall constitute a forfeiture of proceedings with prejudice.
3. At or prior to the dispute proceeding, the vendor and Project Manager, may submit any written or physical materials, objects, statements, affidavits, and arguments which he/she deems relevant to the payment dispute.
4. In the proceeding, the vendor and Project Manager, or his representative or counsel, may also make an oral presentation of his evidence and arguments. Further, only reasonable direct and cross-examination of witnesses shall be permitted, at the discretion of the Chairman of the Payment Dispute Resolution Committee. The members of the Payment Dispute Resolution Committee may make whatever inquiries they deem pertinent to a determination of the dispute.
 - a) The judicial rules of evidence shall not strictly apply; however, witnesses shall be sworn, and any testimony taken under oath and, the members of the Payment Dispute Resolution Committee shall base their decision on competent, substantial evidence. The proceeding shall be de novo. Any prior determinations by administrative officials shall not be final or conclusive.

- b) Within three business days of the conclusion of the proceeding, the Payment Dispute Resolution Committee shall render a decision. The Payment Dispute Resolution Committee decision shall be reduced to writing and provided to the vendor and the County Project Manager. The decision of the Payment Dispute Resolution Committee shall be final and conclusive for all disputes valued less than \$100,000.
- c) For those disputes valued above \$100,000, the Payment Dispute Resolution Committee shall file a Recommended Agency Order for approval by the County Administrator or his designee.

Section 17 AUTHORIZATION TO DEBAR OR SUSPEND VENDOR(S)

- A. Suspension. After consultation with the County Attorney, the Purchasing Director is authorized to suspend a person from consideration for award of contracts if there is probable cause to believe that the person has engaged in any activity, which might lead to debarment. The suspension shall be for a period not to exceed three (3) months, and the Purchasing Director shall immediately inform the Board and provide notice to the affected person.
- B. Debarment. After reasonable notice and a reasonable opportunity for the suspended person to be heard, the Board shall either disbar such person or terminate the suspension. The debarment should be for a period of not more than three (3) years.
- C. Causes for Debarment. The causes for debarment include:
 - 1. Entry of a plea of guilty, no contest, or nolo contendere to or conviction 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;
 - 2. Entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal statutes of 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 responsibility as a County contractor;
 - 3. Entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal antitrust statutes arising out of the submission of bids or proposals;
 - 4. Violation of contract provisions, as set forth below, of a character which is regarded by the Board to be so serious as to justify debarment action:
 - a) deliberate failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or
 - b) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for debarment;
 - 5. Having been adjudicated guilty of any violation by the State of Florida Construction Industry Licensing Board within the past twelve (12) month period at the time of bid submittal;
 - 6. Having been adjudicated guilty by the Leon County Code Enforcement Board of any violation of an environmental ordinance within the past six (6) month period at the time of bid submittal; and

7. Any other cause the Purchasing Director or Board determines to be as serious and compelling as to affect responsibility as a County contractor, including debarment by another governmental entity.

D. Notice of Decision. The Purchasing Director shall issue a written notice to the person of the decision to debar or suspend. The decision shall state the reasons for the action taken and inform the debarred or suspended person involved of his/her rights concerning judicial or administrative review. The written decision shall be mailed or otherwise furnished immediately to the debarred or suspended person.

Section 17.01 APPEAL OF DECISION TO DEBAR OR SUSPEND

The Board's decision to debar or suspend a person or business shall be final and conclusive unless the debarred person commences a timely action in court in accordance with applicable law.

Revised October 8, 2024

Leon County Government Leon County, Florida

Policy No. 96-1

Title: Purchasing Policy
Date Adopted: July 13, 2021
Effective Date: July 13, 2021
Reference: Chapters 274 and 287, Florida Statutes
Policy Superseded: Policy No. 96-1, "Purchasing Policy"; adopted January 16, 1996; revised November 25, 1997; February 24, 1998; March 22, 2005; December 13, 2005; June 13, 2006; February 26, 2009; October 27, 2009; February 9, 2010; March 23, 2010; October 12, 2010; June 14, 2011; August 23, 2011; November 8, 2011; February 14, 2012; March 13, 2012; February 12, 2013; October 29, 2013; January 27, 2015; June 20, 2017; November 12, 2019; February 25, 2020

It shall be the policy of the Leon County Government, that Policy No. 96-1, "Purchasing Policy", revised by the Board of County Commissioners on February 25, 2020 is hereby amended, and a revised policy is hereby adopted in its place, to wit:

LEON COUNTY GOVERNMENT

Purchasing Policy



LEON COUNTY GOVERNMENT
Purchasing Policy

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Section 1 PURPOSE

This policy is adopted to promote the following purposes:

- A. To simplify, clarify, and modernize the procurement practices used by the Leon County Government.
- B. To promote the continued development of professional and equitable procurement policies and practices.
- C. To promote public confidence in the purchasing procedures followed by Leon County.
- D. To ensure the fair and equitable treatment of all persons who deal with the procurement system of Leon County.
- E. To encourage the growth of small and minority businesses through the promotion of an atmosphere conducive to the development and maintenance of small, minority and women owned business participation in the County's procurement system.
- F. To maximize economy in Leon County procurement activities and to maximize to the fullest extent practicable the purchasing value of public funds of Leon County.
- G. To provide safeguards for the maintenance of a procurement system of quality and integrity in Leon County.

Section 2 APPLICATION OF POLICY

- A. **Contracts:** This policy shall apply to contracts/agreements solicited or entered into after the effective date of this policy or subsequent amendments or revisions, unless the parties agree to its application to a contract solicited or entered into prior to the effective date.
- B. **Activities:** This policy shall apply to the purchase/procurement of all materials, supplies, services, construction and equipment except as herein specifically exempted.
- C. **Exemptions from the Purchasing Policy.** The following exemptions do not preclude the County from utilizing competitive procurement practices where possible. The following types of purchasing activities shall be exempt from the purchasing policy except as noted:
 - 1. All heavy equipment repairs shall be exempted from the competitive sealed bid requirements. The Fleet Management Director or designee shall solicit and evaluate quotations and make a recommendation for award. The Purchasing Director shall review the quotations and the recommendation for award and award of the bid shall be made by the appropriate authority as provided in Section 5.0.
 - 2. All purchases of services from a utility whose rates are determined and controlled by the Public Service Commission or other governmental authority, including but not limited to electricity, water, sewer, telephone, and cable television services.
 - 3. All supplies, materials, equipment, or services purchased at a price established in any of the authorized forms of state contracts of the State of Florida Department of Management Services, Division of Purchasing; under the terms and conditions of a cooperative purchasing agreement or term contract by other governmental units, or through other cooperative purchasing organizations.
 - 4. All supplies, and materials, equipment, construction, or services purchased from another unit of government not otherwise limited or prohibited by law.

5. Service/Maintenance Contracts: Continuing service and/or maintenance contracts that are initially awarded as a part of product acquisition/installation to a vendor who is the manufacturer, developer, or who is the authorized service agent thereof and for which funds are annually appropriated in the budget are exempt from further competitive requirements of this policy. Examples are software/hardware maintenance, building systems maintenance, security systems, etc.
6. Real property, real estate brokerage, options of title or abstracts of title for real property, title insurance for real property, and other related costs of acquisition, rental, or sale of real property.
7. All purchases of used equipment having a value of \$50,000 or less; however, each such purchase shall be supported by one equipment appraisal report from the vendor.
8. All purchases of used equipment having a value greater than \$50,000 and less than \$100,000; however, each such purchase shall be supported by two independent equipment appraisal reports.
9. Library Media and Materials. The purchase of library books, education and/or personnel texts, textbooks, printed instructional materials, reference books, periodicals, databases, indexes, pre-recorded library media materials, e.g. audio and video cassettes, film strips, films, sound recordings, computer software, etc., and printed library cards that are to be a part of the library collection are exempt.
10. Grants (Direct Payment) by the County and social services (e.g. burials, reimbursable emergency assistance payments to approved social service agencies, down payment assistance, temporary housing relocation expenses and indigent medical and tubercular care patient services).
11. Advertisements (except Delinquent Tax Notices).
12. Training Media and Services. When such materials or services are available only from the producer, publisher, owner of the copyright or patent, educational institution or training service provider, which developed the training program, the purchase, is exempt from competitive requirements. Approval thresholds in Section 5.0 shall apply.
13. Software. Upgrades, software modification services by the copyright holder, and related software enhancements to installed software purchased through competitive means are exempt. The purchase of new software packages or systems shall follow the thresholds and procedures of the policy to ensure competitive selection.
14. Corporate and media sponsorship agreements up to the formal bid threshold in Section 5.0.
15. Licensed health professionals, e.g., Doctors, Nurses, Veterinarians who provide service directly to patients.
16. Training and educational courses, contracts between the County and governmental entities or nonprofit corporations, dues or memberships, publications, meeting rooms, and hotels when any of the procurements listed previously are below the formal bid threshold in Section 5.0.
17. Lectures by individuals.
18. Artistic services, works of art for public places, and art design and conservation services.
19. Continuing education events or programs.
20. Services of legal counsel authorized by the Office of the County Attorney, including, but not limited to, attorney, expert witnesses, conflict counsel, court reporters, paralegal, mediator, and other services required by the Office of the County Attorney.

21. Travel arrangements and expenses. (Reference Travel Policy)
22. Tourism Event Hosting Applications/Requests/Bids
23. Revenue Generating contracts
24. Food, to include water and beverages, may be purchased with an explanation of the public purpose. (Reference Food Policy)
25. Any other commodities or contractual services listed in Section 287.057 (3) f., Florida Statutes.

D. Environmentally Preferred Purchasing

1. The County will seek to increase acquisition and utilization of environmentally preferred products and services, consistent with price, performance, availability and safety considerations. Environmentally preferred purchases are products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose.
2. The County may consider paying a reasonable premium for environmentally preferred products and services.
3. Any vendor contracting with the County is encouraged to purchase products or materials with recycled content when those products or materials are available at reasonable prices within a reasonable period of time unless the products or materials fail to meet reasonable performance standards.

Section 3 DEFINITIONS

- A. The following terms defined in this section shall have the meanings set forth below whenever they appear in this policy:
1. "Addendum" is a written document used to expand or more fully explain the terms of a solicitation instrument (Invitation to Bid or Request for Proposals). An addendum is not to be confused with a contract "amendment."
 2. "Agreement/Contract" means all types of Leon County agreements, regardless of what they may be called, for the purchase or disposal of supplies, services, materials, equipment, or construction and which name the terms and obligations of the business transaction.
 3. "Blanket Purchase Order" means a purchase order issued to a vendor for an amount not to exceed the face value of the purchase order. A blanket purchase order is for the procurement of commodities or services no single item of which shall exceed the threshold for small purchases unless the appropriate method of procurement was used to generate the Blanket Purchase Order.
 4. "Board" means the Board of County Commissioners of Leon County, Florida.
 5. "Brand Name or Equivalent Specification" means a specification limited to one or more items by manufacturers' names or catalogue numbers to describe the standard of quality, performance, and other salient characteristics needed to meet the County requirements, and which provides for the submission of equivalent products.
 6. "Business" means any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture, or any other private legal entity.

7. "Change Order" means a written order amending the scope of, or correcting errors, omissions, or discrepancies in a contract or purchase order.
8. "Commodity" means a product that the County may contract for or purchase for the use and benefit of the County. A specific item, it is different from the rendering of time and effort by a provider.
9. "Competitive Sealed Bidding" (Invitation for Bid) means a written solicitation for sealed competitive bids used for the procurement of a commodity, group of commodities, or services valued more than the threshold for this category. The invitation for bids is used when the County is capable of specifically defining the scope of work for which a contractual service is required or when the County is capable of establishing precise specifications defining the actual commodity or group of commodities required.
10. "Construction" means the process of building, attaining, repairing, improving, or demolishing any public structure or building, or other public improvement of any kind to any public real property. It does not include routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property.
11. "Contract amendment or modification" means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual action of the parties to the contract.
12. "Contractor" means any person having a contract with Leon County (not to include employment contracts).
13. "Contractual Services" means the rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors, and such services may include, but are not limited to, evaluations; consultations; maintenance; accounting; security; management systems; management consulting; educational training programs; research and development studies or reports on the findings of consultants engaged there under; and professional, technical, and social services.
14. "Contractual Services Contract" is a contract for a contractor's time and effort rather than the furnishing of specific commodities. Satisfactory completion of the service and/or a specified period of time or date completes such contract.
15. "Cooperative Purchasing" is procurement conducted by, or on behalf of, more than one public procurement unit.
16. "Cost Analysis" is the evaluation of cost data for the purpose of arriving at costs actually incurred or estimates of costs to be incurred, prices to be paid, and costs to be reimbursed.
17. "Data" means recorded information, regardless of form or characteristic.
18. "Definite Quantity Contract" is a contract whereby the contractor(s) agrees to furnish a specific quantity of an item or items at a specified price and time to specified locations. Delivery by the vendor and acceptance of the specific quantity by the County completes such contract.
19. "Designee" means a duly authorized representative of a person holding a superior position.
20. "Emergency" means when there exists a threat to public health, welfare, or safety; natural or unnatural, unexpected events; accidents; or loss to the County under emergency conditions which shall be considered to mean those situations where the operation of a department or division would be seriously impaired if immediate action were not taken.
21. "Emergency Purchase" is a purchase necessitated by a sudden unexpected turn of events (e.g., acts of God, riots, fires, floods, accidents or any circumstances or cause beyond the control of the

- agency in the normal conduct of its business) where the delay incident to competitive bidding would be detrimental to the interests of the County.
22. "Employee" means an individual drawing a salary from Leon County, whether elected or non-elected. For the purposes of this policy, it also means that any non-compensated individual performing personal services for Leon County is to be governed by these rules.
 23. "Established Catalog Price" is the price included in a catalog, price list, schedule, or other form that:
 - a) is regularly maintained by a manufacturer or contractor;
 - b) is either published or otherwise available for inspection by customers; and
 - c) states prices at which sales are currently or were last made to a significant number of any category of buyers or those buyers constituting the general buying public for the supplies or services involved.
 24. "Field Quotes" is the procurement procedure used by the operating department or divisions to purchase commodities or contractual services with a value within the threshold amounts set for this category and are conducted by the department or division.
 25. "f.o.b. or FOB (free on board)" is a term used in conjunction with an identified physical location to determine the responsibility and basis for payment of freight charges, and the point at which title for the shipment passes from seller to buyer. Commonly used deliveries are:
 - a) FOB Destination. A shipment to be delivered to a destination designated by the buyer and the point at which buyer accepts title.
 - b) FOB Shipping Point (Origin). A shipment is to be delivered to the buyer with passage of title, on board the indicated conveyance or carrier at the contractor's designated facility.
 26. "Gratuity" is a payment, loan, subscription, advance, deposit of money, service, or anything of more than nominal value, present or promised, inuring to the benefit of an employee, unless consideration of substantially equal or greater value is given by the employee.
 27. "Informal Sealed Bid" is a written solicitation method used by the County for securing prices and selecting a provider of commodities or services with a value within the threshold for this category.
 28. "Intended Decision" means a written notice that states the firm or firms to whom the County intends to award a contract resulting from a solicitation and which establishes the period in which a notice of intent to protest may be timely filed. The Intended Decision is posted on the County website and on the Public Notice board in the Purchasing Division.
 29. "Invitation for Bid" (Competitive Sealed Bidding) means a written solicitation for sealed competitive bids used for the procurement of a commodity, group of commodities, or services valued more than the threshold for this category. The invitation for bids is used when the County is capable of specifically defining the scope of work for which a contractual service is required or when the County is capable of establishing precise specifications defining the actual commodity or group of commodities required.
 30. "Invitation to Negotiate" means a written solicitation that calls for responses to select one or more persons or business entities with which to commence negotiations for the procurement of commodities or contractual services.
 31. "Joint Venture" means:
 - a) a combination of contractors performing a specific job in which business enterprises participate and share a percentage of the net profit or loss; or
 - b) a joint business association of a minority individual(s)/firm(s) as defined herein, and a non-minority individual(s)/firm(s) to carry out a single business enterprise for which purpose the individuals/firms combine their property, money, efforts, skills and/or knowledge.

32. "Local Business" means a business which:
 - a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six months immediately prior to the issuance of the request for competitive bids or request for proposals by the county; and
 - b) Holds any business license required by Leon County, and, if applicable, the City of Tallahassee; and
 - c) Is the principal offeror who is a single offeror; a business that is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.
33. "Manufacturer" means a person or firm engaged in the process of making, fabricating, constructing, forming, or assembling a product(s) from raw, unfinished, semi-finished, finished, or recycled materials through a direct contract/agreement on behalf of the general contractor.
34. "Minor Irregularity" means a variation from solicitation terms and conditions which does not affect the price of the solicitation of the quality of services sought, give the bidder/proposer an unfair advantage over other bidders/proposers, or adversely impact the interests of the County.
35. "Option to Renew" means a contract clause that allows a party to reinstate the contract for an additional term.
36. "Person" means any business, individual, committee, club, other organization, or group of individuals.
37. "Pre-Bid Conference" (or Pre-Proposal Conference) means a meeting held with prospective bidders prior to solicitation of or the date for receipt of bids or proposals, to recognize state of the art limits, technical aspects, specifications, and standards relative to the subject, and to elicit expertise and bidders' interest in submitting a bid or pursuing the task.
38. "Procurement Award" is an award of a contract for goods or services resulting from a solicitation through action by the Board of County Commissioners in a public meeting.
39. "Professional Services" means those services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined by the State of Florida, or those performed by any architect, professional engineer, landscape architect, or registered land surveyor in connection with his professional employment or practice.
40. "Purchase Order" means that document used by Leon County to request that a contract be entered into for a specified need, and may include, but not be limited to, the technical description of the requested item, delivery schedule, transportation, criteria for evaluation, payment terms, and other specifications.
41. "Purchasing" means buying, procuring, renting, leasing, or otherwise acquiring any materials, supplies, services, construction, or equipment. It also includes all functions that pertain to the obtaining of any material, supplies, services, construction, and equipment, including description of specifications and requirements, selection and solicitation of resources, preparation, and award of contract.
42. "Purchasing Director" means the Leon County employee duly authorized to enter into and administer contracts and make written determinations with respect thereto under the terms of the purchasing policies of the Leon County Government.
43. "Purchasing Quotes" is the procedure used to purchase commodities or contractual services wherein the Purchasing Director or Purchasing Agents obtain either written or oral quotations from three or more vendors for purchases within the threshold amounts set for this category.
44. "Recycled Content" means materials that have been recycled and are contained in the products or materials to be procured, including, but not limited to, paper, plastic, aluminum, glass, and composted

- materials. The term does not include internally generated scrap that is commonly used in industrial or manufacturing processes or waste or scrap purchased from another manufacturer who manufactures the same or a closely related product.
45. "Regulation" means a statement by the Board of County Commissioners having general or particular applicability and future effect, designed to implement, interpret, or prescribe law, policy, or practice.
 46. "Request for Information" means a written or electronically posted request to vendors for information concerning commodities or contractual services. Responses to these requests are not offers and may not be accepted to form a binding contract.
 47. "Request for Proposals" (RFP) means a written solicitation for sealed proposals with the title, date, and hour of public opening designated. The request for proposals may be used when the County is unable to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required, and when the County is requesting that a qualified offeror propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document.
 48. "Request for a Quote" means a solicitation that calls for pricing information for purposes of competitively selecting and procuring commodities and contractual services from qualified or registered vendors.
 49. "Responsible bidder or offeror" means a person who has the capability, in all respects, to perform fully the contract requirements, and the integrity and reliability, which will assure good faith performance.
 50. "Responsive bidder" means a person who has submitted a bid, which conforms in all material respects to the Invitation to Bid or the Request for Proposals.
 51. "Revenue Generating Contract" means a contract where revenue is received for goods and services provided on behalf of governmental entities.
 52. "Services" means the furnishing of labor, time, or effort by a contractor, not involving the delivery of a specific end product other than those which is not defined as supplies and which are merely incidental to the required performance. This term shall not include employment agreements or collective bargaining agreements.
 53. "Small Purchases" means the procurement of commodities or services with a value within the thresholds set for this category without the requirement of quotes, bids, or public notice under procedures established by the Purchasing Division.
 54. "Single Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from one available practical source of supply because of standardization, warranty, or other factors, even though other competitive sources may be available. A Single Source may be declared such by the Board of County Commissioners for reasons acceptable to it.
 55. "Sole Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from one available practical source of supply because of an inability to obtain competition, proprietary technology, copyright, or a supplier's unique capability. A Sole Source may be declared such by the Board of County Commissioners for reasons acceptable to it.
 56. "Specification" means any description of the physical or functional characteristics of the nature of a material, supply, service, construction, or equipment item. It may include a description of any requirement for inspection, testing, recycled, or degradable materials content, or preparing a material, supply, service, construction, or equipment item for delivery.
 57. "Supplier" means a person or firm who engages in the selling of materials and supplies to contractors, subcontractors, and/or manufacturers for the purpose of constructing, repairing, altering, remodeling,

adding to or subtracting from or improving any building, structure, or property through a direct contract/agreement on behalf of the general contractor.

58. "Tangible Personal Property" is defined as property which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment.
59. "Term Contract" means indefinite quantity contract whereby a contractor(s) agrees to furnish an item or items during a prescribed period of time (such as 3, 6, 9, 12 months or a specific date). The specified period of time or date completes such contract.
60. "Tie (Identical) Bid" is when two or more bids are equal with respect to price and it appears that the quality and service offered by the vendors are otherwise comparable.
61. "Tourism Event Hosting Application/Request/Bid" means the process utilized by the Tourism Department when applying to organizations to host tourism events.

Section 4 AUTHORITY OF PURCHASING DIRECTOR

- A. The Purchasing Director shall serve as the central purchasing officer of Leon County.
- B. The Purchasing Director shall develop and administer operational procedures implementing this policy and for governing the internal functions of the Division of Purchasing.
- C. Except as otherwise specifically provided in this policy, the Purchasing Director, or his/her designee, shall, in accordance with regulations promulgated by the Leon County Government:
 1. Purchase or supervise the purchase of all supplies, services, materials, equipment, and construction services defined within the scope of this policy.
 2. Operate a central warehouse for the purchasing, in bulk, of items that may be more economically bought and distributed than when purchased on an individual basis; and, to provide facilities for storage of critically needed supplies.
 3. Administer the County Purchasing Card Program.
 4. Administer the Property Control Program.
- D. Upon the prior approval of the County Administrator or designee, the Purchasing Director may delegate authority to designee(s) as allowed by law or rule.
- E. The Purchasing Director shall coordinate with the Tallahassee-Leon County Office of Economic Vitality, Office of Minority, Women, and Small Business Enterprise, to implement, monitor, and enforce the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy.

Section 5 PURCHASING CATEGORIES; THRESHOLD AMOUNTS

Table 1 Purchasing Process Thresholds	
Procurement Method	Threshold
Petty Cash/Reimbursement (Section 5.02)	Not to exceed \$100
Small Purchase Procedures (Section 5.03) Tangible Property/Controlled Asset Consumables Warehouse Operations (Section 5.031)	\$1 to \$1,000 \$1 to \$2,500 \$1 to \$5,000
Blanket Purchase Orders (Section 5.04) Non-contractual Basis Contractual Basis	not to exceed \$5,000 not to exceed annual contract value
Field Quotes (Section 5.05) Tangible Property/Controlled Asset Consumables	\$1,000 to \$5,000 \$2,500 to \$5,000
Purchasing Quotes (Section 5.06)	\$5,000.01 to \$50,000
Bid - Informal Bid Process – Standard (Section 5.07)	\$50,000.01 to \$100,000
Bid – Informal Bid Process for Tenant Renovations/ Improvements to County Space Leased by Private Entities (Section 5.07.1)	\$50,000.01 to \$200,000
Bid - Competitive Sealed Bids (Section 5.08)	\$100,000.01 and above
RFP - Competitive Sealed Proposals (Sections 5.09 and 5.09.1)	Purchasing Director – Authorized to Release RFPs Expected to Result in Costs No Greater than \$100,000; County Administrator – Authorized to release all RFPs

Table 2 Contract Award and Signature Authority Thresholds	
Individual	Threshold ¹
Purchasing Director	*Procurement Agreements up to \$100,000
County Administrator	*Procurement Agreements greater than \$100,000 and no greater than \$250,000
Board of County Commissioners	*Procurement Agreements greater than \$250,000
¹ Term contracts will be awarded based upon the value of the initial term of the contract.	
*All contracts will be in a form approved by the County Attorney's Office prior to execution.	

Section 5.01 UTILIZATION OF MINORITY, WOMEN, AND SMALL BUSINESS ENTERPRISES

Leon County procurement activities will be conducted in compliance with the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy as adopted by the Leon County Board of County Commissioners on February 25, 2020. Employees are encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the procurement process, when available.

Whenever practicable, at least one of the three quotes/bids from certified minority, women, and small business enterprises shall be secured for Small Purchases, Field Quotes, Purchasing Quotes, and Informal Bids. The Purchasing Director or designee shall review the quotations and make the award or require additional quotations/bids prior to award.

Section 5.02 PETTY CASH/REIMBURSEMENT

- A. Petty cash funds shall be established and administered under the financial policies of the Board.
- B. Purchases from any petty cash fund or the reimbursement for a purchase shall be governed by the following requirements:
 - 1. No purchase of any single item from any petty cash fund or for reimbursement shall exceed the authorized dollar limit for petty cash/reimbursements in Section 5.
 - 2. Reimbursement for employee travel expenses from a petty cash fund shall not be allowed, except for local parking or toll costs.
 - 3. Funds contained within a petty cash fund shall not be expended for the payment of salaries.
 - 4. Expenditures from a petty cash fund or personal funds shall be reimbursed, provided:
 - a) They are supported by itemized vouchers, invoices, or receipts signed by the division or department head or designee.
 - b) They qualify as a proper public purpose.
 - c) They are expenses included within the approved annual budget of the division or department.

Section 5.03 SMALL PURCHASES

The purchase of commodities, equipment, and services, which cost less than the threshold authorized in Section 5, does not require solicitation of quotes or bids. Small purchases shall be authorized by Department or Division heads or their designees. Small purchase thresholds are to be determined utilizing the definitions below. Specific questions should be referred to the Purchasing Division for final decisions as to the determination of the category to be utilized.

- A. Tangible Property/Controlled Asset - Items/Assets that require a property tag and inclusion on the County inventory. ALL Tangible Property must be procured via a purchase order pursuant to the Tangible Personal Property Policy No. 02-5. For purposes of this section tangible property/controlled asset includes the following:
 - 1. An item which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment; and
 - 2. An item with a historical cost less than \$1,000 but has been identified as being particularly at risk or vulnerable to loss or theft and having a residual value when approaching its end of shelf life by the Purchasing Director and the appropriate Division Director. Examples include computers, laptops, iPads, certain types of IT equipment, and certain types of maintenance equipment.
- B. Consumables – Commodities and services that are not included in the Tangible Property/Controlled Asset description above. These items are generally assumed to be consumed during use, have little to no residual value when wear-out is achieved/reached, intended to be used up and then replaced, or used up very quickly. Some examples include writing instruments, fuel, filters, most items of clothing, paper products, food, and some replaceable hand tools such as shovels, rakes, etc.

Section 5.03.1 WAREHOUSE OPERATIONS

The purchase of commodities, materials, and equipment for warehouse inventory, which cost less than the threshold authorized in Section 5, does not require solicitation of quotes or bids. Use of economic indices, review of costs, market trends, and/or use of periodic quotations shall be used by staff to assure cost effective purchases.

Section 5.04 BLANKET PURCHASE ORDERS

Blanket Purchase Orders of either type listed below shall not be used to purchase any tangible personal property item. Tangible personal property items shall be listed as individual line items on a purchase order.

- A. Non-contractual Basis - All purchases made with a non-contractual blanket purchase order shall follow the thresholds and requirements for competitive selection. No purchase order shall be issued for an amount greater than the limit established for a non-contractual blanket purchase order in Section 5 of this policy for the purchase of goods or services not under a contractual arrangement authorized under this purchasing policy or approved by the Board.
- B. Contractual Basis - No purchase order shall be issued for an amount greater than the limit established for a contractual blanket purchase order in Section 5 of this policy for the purchase of goods or services unless approved by the Board.

Section 5.05 FIELD QUOTES

The purchase of goods and services, which cost within the range authorized for field quotes in Section 5, shall require competitive quotations from three or more vendors. The quotations may be obtained by the Department/Divisions.

Section 5.06 PURCHASING QUOTES

The purchase of goods and services, which cost within the range authorized for purchasing quotes in Section 5, shall require competitive quotations from three or more vendors. The quotations may be obtained by the operating department/division or the Purchasing Division and shall be reviewed by the Purchasing Director, or designee. Quotes must be on company letterhead, quote forms, or in a similar format with a date and signature of an authorized representative of the vendor. Quotes obtained for PCard purchases must be attached to the PCard reconciliation.

Section 5.07 INFORMAL BIDS

For purchases within the cost range authorized for informal bids in Section 5, the Purchasing Director or designee shall secure, whenever possible, a minimum of three written quotations, which shall be the result of written specifications transmitted by mail, by electronic format, or by facsimile. When such quotations are received by facsimile, the purchasing agent will immediately seal and label the quotations until the time set for opening bids. In those instances where the securing of three quotations is not practicable, the Purchasing Director or designee shall provide written justification of such. The quotations shall be reviewed, and a written recommendation of award shall be prepared for review and action.

Section 5.07.1 INFORMAL BIDS FOR TENANT RENOVATIONS AND IMPROVEMENTS FOR LEASED SPACE

For purchases for tenant renovations/improvements for County-owned spaces leased to private entities and within the cost range authorized for informal bids for lease space in Section 5, all procedures in Section 5.07 shall be followed.

Section 5.08 COMPETITIVE SEALED BIDDING

- A. Conditions for Use. All contracts for purchases of a single item or aggregate for the proposed term of service in excess of the established base amount for competitive sealed bidding in Section 5 shall be awarded on the basis of sealed competitive bidding, except as provided in Section 5.09, Competitive Sealed Proposals.
- B. Invitation to Bid. An invitation to bid shall be issued and shall include specifications, all contractual terms and conditions, and the place, date, and time for opening or submittal. All interpretations or corrections shall be issued as addenda. The County shall not be responsible for oral clarifications or representations.

1. Alternate(s). Alternate bids will not be considered unless authorized by and defined in the invitation to bid or addenda thereto.
2. Approved Equivalents. The County reserves the right to determine acceptance of item(s) as an approved equivalent. Bids, which do not comply with, stated requirements for equivalents in the bid conditions are subject to rejection. The procedure for acceptance of equivalents shall be included in the invitation to bid or addenda thereto.
3. Human Trafficking language shall be incorporated into the Invitation to Bid requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes. .

C. Public Notice.

1. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$200,000 shall be publicly advertised at least once in a newspaper of general circulation in the County at least 21 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$500,000 shall be publicly advertised at least once in a newspaper of general circulation in the County at least 30 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. Bids or proposals shall be received and opened at the location, date, and time established in the bid or proposal advertisement. In cases of emergency, the procedures required in this section may be altered by the County in any manner that is reasonable under the emergency circumstances.

The solicitation of competitive bids for work on roads shall be publicly advertised in a newspaper of general circulation in the county at least once each week for two consecutive weeks.

2. Changes to Public Notice. If the location, date, or time of the bid opening changes, written notice of the change shall be given in the form of an addendum, as soon as practicable after the change is made and posted on the Purchasing Division website.
3. Each invitation to bid, request for proposals, request for qualifications, invitation to negotiate, or other procurement solicitation which is anticipated to include travel expenses by authorized persons as defined in the Leon County Travel Policy shall include the following notice:

“Consultant travel which is not covered within the scope of the consultant’s contract and which is billed separately to the County on a cost reimbursement basis must receive prior approval and will be reimbursed in accordance with the Leon County Travel Policy. Travel expenses shall be limited to those expenses necessarily incurred in the performance of a public purpose authorized by law to be performed by the Leon County Government and must be within limitations described herein and in Ch. 112.06, Florida Statutes. Consultants and contractors, traveling on a cost reimbursement basis, must have their travel authorized by the department head from whose budget the travel expenses will be paid and the County Administrator.”

- D. Bid Opening. Bids shall be opened publicly. At least one representative from the Division of Purchasing shall open the bids in the presence of one or more witnesses at the time and place designated in the Invitation to Bid. The amount of each bid, and such other relevant information as may be deemed appropriate by the Purchasing Director, together with the name of each bidder, and all witnesses shall be recorded. The record (Tabulation Sheet) and each bid shall be open to public inspection as provided by law.

- E. Bid Acceptance and Evaluation. Bids shall be unconditionally accepted without alteration or correction, except as authorized in this Policy. Bids shall be evaluated based on the requirements set forth in the Invitation to Bid, which may include, but not be limited to criteria to determine acceptability such as: inspection, testing, quality, recycled or degradable materials content, workmanship, delivery, and suitability for a particular purpose and/or factors to determine a bidder's level of responsibility such as references, work history, bonding capacity, licensure, certifications, etc. Those criteria that will affect the bid price and that are to be considered in evaluation for award shall be objectively measured, such as discounts, transportation costs, and total or life cycle costs. No criteria may be used in bid evaluation that is not set forth in the Invitation to Bid, in regulations, or in this policy.
- F. Bid Agenda Item/Award Memo. The Tabulation Sheet and other bid documents, as necessary, shall be presented to the appropriate department or division head for review and recommendation. The department or division head shall prepare the recommendation in the appropriate format to the awarding authority as prescribed in Section 5.
- G. Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids, before or after award, or cancellation of awards or contracts based on such bid mistakes, shall be permitted where appropriate under the sole discretion of the County. Mistakes discovered before bid opening may be modified or withdrawn upon written notice received in the office designated in the Invitation for Bids prior to the time set for bid opening. After bid opening, corrections in bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence that a mistake of a non-judgmental character was made, the nature of the mistake, and the bid price actually intended. After bid opening, no changes in bid price or other provisions of bids prejudicial to the interest of the County or fair competition shall be permitted. In lieu of bid correction, a low bidder alleging a material mistake of fact may be permitted to withdraw its bid if:
1. the mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident; or
 2. the bidder submits evidence that clearly and convincingly demonstrates that a mistake was made. All decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes, shall be supported by a written determination made by the Purchasing Director and concurred with by the County Administrator.
- H. Multi-Step Sealed Bidding.
1. When it is considered impractical to initially prepare a purchase description to support an award based on price, an invitation for bids or request for proposals may be issued requesting the submission of unpriced offers to be followed by an invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation.
 2. A multi-step process utilizing pre-qualification of bidders or respondents may be used to ensure that the bidders/respondents have the appropriate licensure, capacity, qualifications, experience, staffing, equipment, bonding, insurance and similar project-based criteria to successfully perform a specific project or service. Those bidders/respondents determined qualified in the pre-qualification will then be eligible to participate in the invitation to bid or request for proposal process for the project or service. The Purchasing Director shall develop and administer operational procedures governing any such pre-qualification process.
- I. Award. The contract shall be awarded with reasonable promptness to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the invitation to bid. The County reserves the right to waive any minor irregularity in bids and to make an award in whole or in part when either or both conditions are in the best interest of Leon County. The contract shall be awarded by purchase order or other written notice. Every procurement of contractual services shall be evidenced by a written agreement.

1. Notice of Intended Decision. The Intended Decision shall be posted on the County website and on the public notice board in the Purchasing Division. This written notice shall state the firm or firms to whom the County intends to award the contract resulting from the solicitation and establishes the 72 consecutive hour period in which a notice of intent to protest may be timely filed.
 2. Notice of Right to Protest. Any bid award recommendation may be protested if the recommendation is alleged to be contrary to the County's rules or policies, the solicitation specifications, or law. The standard of proof for such proceedings shall be whether the action is clearly erroneous, contrary to competition, arbitrary or capricious. Such notice of intent of bid protest shall be delivered to the Purchasing Director within 72 consecutive hours after posting of the Notice of Intended Decision of Award (excluding Saturdays, Sundays, and County holidays). Protestor shall file thereafter a formal written bid challenge within 10 calendar days after the date in which the notice of intent of bid protest has been submitted. Failure to timely file a notice of intent of bid protest or failure to timely file a formal written bid protest with the proper bond shall constitute a waiver of all rights provided under the Leon County Purchasing Policy.
- J. Cancellation of Invitations for Bids. An invitation for bids or other solicitation may be canceled, or any or all bids may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director or designee, in concurrence with the County Administrator or designee. Notice of cancellation shall be provided to all plan-holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.
- K. Disqualification of Vendors. For any specific bid, vendors may be disqualified by the Purchasing Director, or designee for the following reasons:
1. Failure to materially perform according to contract provisions on prior contracts with the County.
 2. Conviction in a court of law of any criminal offense in connection with the conduct of business.
 3. Clear and convincing evidence of a violation of any federal or state anti-trust law based on the submission of bids or proposals, or the awarding of contracts.
 4. Clear and convincing evidence that the vendor has attempted to give a Board employee a gratuity of any kind for the purpose of influencing a recommendation or decision in connection with any part of the Board's purchasing activity.
 5. Failure to execute a Public Entity Crimes Statement as required by Florida Statutes Chapter 287.133(3)(a).
 6. Other reasons deemed appropriate by the Board of County Commissioners.
- L. Negotiation of Terms and Conditions – Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, or all bids received exceed the available budget identified for the commodity or contractual service, the Purchasing Director or designee may negotiate on the best terms and conditions. The Purchasing Director or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations. Award will be made according to the award thresholds in Section 5.
- M. Local preference in bidding.
1. In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual

services, and construction of improvements to real property or existing structures in which pricing is the major consideration, the County may give a preference to Local Businesses in making such purchase or awarding such contract, as follows:

- a) Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent of the bid price.
 - b) Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent of the bid price.
 - c) The maximum cost differential shall not exceed \$20,000.00. Total bid price shall include the base bid and all alternatives or options to the base bids, which are part of the bid and being recommended for award by the appropriate authority.
2. Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a "Local Business."
 3. Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator or designee.

(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)

N. Prohibited Communications

Any form of communication, except for written correspondence with the Purchasing Division requesting clarification or asking questions, shall be prohibited regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between:

1. Any person or person's representative seeking an award from such competitive solicitation; and
2. Any County Commissioner or Commissioner's staff, or any county employee authorized to act on behalf of the Commission to award a particular contract.

For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.

The prohibited communication shall be in effect as of the release of the competitive solicitation and terminate at the time the Board, or a County department authorized to act on behalf of the Board, awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.

The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, contract negotiations during any public meetings, presentations made to the Board, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between any employee and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and any employee, communications with the County Attorney or communications with the Purchasing Director.

Prohibited communications may result in disqualification from the particular request for proposal, request for qualification, bid, or any other competitive solicitation and shall be grounds for suspension from doing business with the County.

Section 5.09 COMPETITIVE SEALED PROPOSALS

Section 5.09.1 PROFESSIONAL ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL, AND LAND SURVEYING SERVICES

- A. Purpose. The purpose of this section, and the procedures established hereunder, is to ensure compliance with Section 287.055 Florida Statutes, known as the Consultants Competitive Negotiation Act (CCNA). This act establishes parameters within which the County must select professional services from architects, engineers, landscape architects, surveyors, and mappers. The CCNA requires the County to select these services on a qualitative basis using prescribed criteria prior to any negotiations, which may consider the cost of such services.
- B. Public Announcement. It is the policy of the County to publicly announce all requirements for professional architectural, engineering, landscape architectural, land surveying, and mapping services, and to negotiate such contracts on the basis of demonstrated competence and qualifications at fair and reasonable prices. In the procurement of such services, the Purchasing Director may require firms to submit a statement of qualifications, performance data, and other information related to the performance of professional services.
1. Scope of Project Requirements.
 - a) For specific projects, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) the objectives of the study or service;
 - 3) estimated period of time needed for the service or the study;
 - 4) the estimated cost of the service or study;
 - 5) whether the proposed study or service would or would not duplicate any prior or existing study or service; and
 - 6) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.
 - b) For Continuing Supply Services, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) estimated period of time needed for the service or the study;
 - 3) the estimated cost of the service or study;
 - 4) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.
 2. Review of Project Requirements. The Purchasing Director or his/her designee shall review the scope of project requirements and prepare a draft request for proposals. The draft RFP shall be submitted to the requesting office for consideration and revision, as may be needed, prior to public distribution of the RFP.
 3. Distribution of RFP. The Purchasing Director shall distribute the RFP in accord with standard procedures including publication of legal notice and provide notification of the date and time when such proposals are due. Public notice shall be as provided in Section 5.08 (C).

4. Negotiation of Terms and Conditions – Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, the Purchasing Director, or designee may negotiate on the best terms and conditions. The Purchasing Director, or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations.
5. Modification Prohibition. After the publicized submission time and date, any proposal received shall not be modified or allowed to be modified in any manner except for correction of clerical errors or other similar minor irregularities as may be allowed by the Purchasing Director or the Selection Committee (defined in Section 5.09.1(C) at any point in the process prior to contract negotiations.
6. Reuse of Existing Plans. There shall be no public notice requirements or utilization of the selection process as provided in this section for projects in which the County is able to reuse existing plans from a prior project. However, public notice of any plans, which are intended to be reused at some future time, shall contain a statement that provides that the plans are subject to reuse.
7. Local preference in Requests for Proposals.
 - a) In the purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures for which a request for proposals is developed with evaluation criteria, a local preference of the total score may be assigned for a local preference, as follows:
 - 1) Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent.
 - 2) Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent.
 - b) Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a “Local Business.”
 - c) Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator.

(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)

8. Human Trafficking language shall be incorporated into the Request for Proposals requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.
9. Exemptions. This section shall not apply to a professional service contract for a project where the basic construction cost is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or for a planning or study activity when the fee for professional services is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or in cases of valid public emergency so certified by the County Administrator. This section shall not apply to any requirement for professional services if a continuing contract is in effect and a determination is made to utilize the continuing contract to obtain such services.

- C. CCNA Evaluation Committee Membership and Evaluation.
1. Depending on the expected complexity and expense of the professional services to be contracted, the County Administrator, or his/her designee shall determine whether a three member or five-member selection committee will best serve the needs of the County.
 2. Membership of all Evaluation Committees shall be appointed by the County Administrator or his/her designee.
 3. Public Meetings. In accordance with Florida Statute 286.011, all Evaluation Committee meetings subsequent to the opening of the solicitation are to be public meetings. The Chairperson shall be responsible to provide the Purchasing Division with all meeting information (date, time, location, and reason for meeting) no less than 96 hours in advance of any scheduled meeting, excluding holidays and weekends. The Purchasing Division will provide reasonable notice of all meetings, no less than 72 hours in advance of such scheduled meeting, excluding holidays and weekends, by posting a Notice of Evaluation Committee Meeting on the public notice bulletin board in the Division offices and on the Leon County website. The Purchasing Director shall develop and implement Evaluation Committee procedures to ensure compliance with public meeting requirements.
 4. Contact with the CCNA Evaluation Committee. Members of the CCNA Evaluation Committee are prohibited from discussing a project with any professional or professional firm that may submit a proposal during the procurement process, except in formal committee meetings. The conduct of the business and discussions regarding the proposals before the CCNA Evaluation Committee must be done in the public meetings only.
 5. Evaluation of Proposals. Only written responses of statements of qualifications, performance data, and other data received in the purchasing office by the publicized submission time and date shall be evaluated.
 - a) The initial ranking of proposals is based upon the points given in the Weighted Scoring Sheet utilizing the Evaluation Criteria Matrix. The scores will be provided by the Purchasing and MWSBE Divisions for Local preference and MWBE participation, respectively.
 - b) Shortlisting. The best-qualified respondents shall be based upon the CCNA Evaluation Committee's ability to differentiate qualifications applicable to the scope and nature of the services to be performed as indicated by the ratings on the Weighted Scoring Sheet. Typically, the top three rated firms, if there are at least three responsive respondents, will be considered as the shortlisted firms, unless the County Administrator or designee, after input and discussion with the CCNA Evaluation Committee, approves adding additional firms to the shortlist.
 6. Presentations/Interviews. The CCNA Evaluation Committee may choose to conduct formal presentations/interviews with shortlisted firms prior to final ranking.
 7. Final Ranking. The CCNA Evaluation Committee shall utilize the Ordinal Process Rating System to rank the firms. The respondents shall be listed in order of preference starting at the top of the list. The list of best-qualified persons shall be forwarded to the County Administrator or Board, as appropriate, for approval prior to beginning contract negotiations. Negotiation sequence shall be based on the order of preference.
- D. Negotiation Staff. Contract negotiations shall be conducted by the Purchasing Director or designee(s) or by a Negotiation Committee.
1. Negotiation Committee Membership. Membership of the three-member Negotiation Committee shall consist of:
 - a) the Purchasing Director, or the designee of the Purchasing Director who shall chair the committee,
 - b) the head of the primary using department or agency, or his/her designee,
 - c) the County Attorney or designee.

2. **Negotiation.** The Negotiator(s) shall negotiate a contract with the firm considered to be the most qualified to provide the services at compensation and upon terms which the Negotiator(s) determines to be fair and reasonable to the County. In making this decision, the Negotiator(s) shall take into account the estimated value, the scope, the complexity, and the professional nature of the services to be rendered. Should the Negotiator(s) be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, negotiations with that firm shall be formally terminated. The Negotiator(s) shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the Negotiator(s) shall formally terminate negotiations, and shall then undertake negotiations with the third most qualified firm. Should the Negotiator(s) be unable to negotiate a satisfactory contract with any of the selected firms, the Selection Committee shall select additional firms in order of their competence and qualifications, and the Negotiator(s) shall continue negotiations in accordance with this Section until an agreement is reached or until a determination has been made not to contract for such services.
 3. **Continuing Contracts.** Nothing in this section (5.09.1) shall be construed to prohibit continuing contracts for professional services between a firm and the County.
- E. **Cancellation of Solicitations.** Any solicitation may be canceled, or any or all responses may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director in consultation with the County Administrator or designee. Notice of cancellation shall be provided to all plan-holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.

Section 5.09.2 OTHER COMPETITIVE SEALED PROPOSALS

- A. **Conditions for Use.** When the Director of Purchasing determines that the use of competitive sealed bidding is either not practical or not advantageous to the County, a contract may be entered into by the use of competitive sealed proposals.
- B. **Consultant's Competitive Negotiation Act.** Professional services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined under the Consultant's Competitive Negotiation Act (Section 287.055, Florida Statutes), shall be secured under the provisions of Section 5.09.1.
- C. **Public Notice.** Adequate public notice of the Request for Proposals shall be given in the same manner as provided in subsection 5.08C of this policy for competitive sealed bidding.
- D. **Evaluation Factors.** The Request for Proposals shall state the relative importance of criteria outlined in the scope of services, fee proposal, and other evaluation criteria.
- E. **Proposal Cancellation or Postponement.** The Director of Purchasing or designee may, prior to a proposal opening, elect to cancel or postpone the date and/or time for proposal opening or submission.
- F. **Revisions and Discussions with Responsible Offerors.** Discussions may be conducted with responsible offerors who submit proposals determined to be qualified of being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining the best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing offerors.

- G. Award. Award shall be made to the responsive, responsible offeror whose proposal is determined in writing to be the most advantageous to Leon County, taking into consideration the evaluation factors set forth in the Request for Proposals. No other factors or criteria shall be used in the evaluation criteria that are not included in the Request for Proposal. The County reserves the right to waive any minor irregularity in proposals and to make an award in whole or in part when either or both conditions are in the best interest of Leon County.
- H. Local preference in Other Competitive Sealed Proposals. In the purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures for which a request for proposals is developed with evaluation criteria, a local preference of the total score may be assigned for a local preference, as follows:
1. Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent.
 2. Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent.
- (Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)*
- I. Human Trafficking language shall be incorporated into the Request for Proposals requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.
- J. Negotiation of Terms and Conditions – Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, the Purchasing Director or designee may negotiate on the best terms and conditions. The Purchasing Director or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations.
- K. Cancellation of Solicitations. Any solicitation may be canceled, or any or all responses may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director in consultation with the County Administrator or designee. Notice of cancellation shall be provided to all plan-holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.

Section 5.10 SINGLE AND SOLE SOURCE PURCHASES

- A. Single/Sole Source Certification. A contract may be awarded, except as otherwise provided for under state law, for a supply, service, material, equipment or construction item(s) without competition when the Purchasing Director, with the concurrence of the County Administrator or designee, certifies in writing, after conducting a good faith review of available sources, that there is only one available source for the required material, supply, service, equipment, or construction item(s). Such awards will be made within the authorized procurement limits identified in Section 5.0. When a purchase exceeds the threshold amount for Board approval, the item will be placed on the agenda for Board approval and certification that the vendor has been determined to be a single or sole source.
- B. Additional Purchases from Certified Single/Sole Source. The Purchasing Director shall be authorized, after initial single/sole source certification, to make additional purchases from a sole source vendor for a minimum of one year or until such time as contrary evidence is presented regarding sole source eligibility.

Section 5.11 EMERGENCY PURCHASES

- A. Authorization During Normal Business Hours. In the case of emergencies that require the immediate purchase of goods, equipment or services, the County Administrator, Purchasing Director, Group Director, or his designee

shall be empowered to secure such goods or services without competitive bidding. In this event, all measures reasonably possible under the circumstances shall be taken to assure the maximum cost benefit to the County of the goods or services procured.

- B. Authorization Outside of Normal Business Hours. A department or division head, during non-business hours, is authorized to make purchases without competitive bids, when an emergency arises.
- C. Documentation and Approval. Documentation for emergency purchases pertaining to Section 5.11 (A) and (B) shall be submitted to the Purchasing Office on the standard requisition form with a detailed explanation, and support material attached, if applicable, within 10 workdays after the event occurred. Emergency purchases that exceed the competitive sealed bid threshold shall be ratified by the Board. Emergency purchases within the informal bid thresholds shall be approved by the County Administrator after-the-fact.
- D. Mutual Aid Agreements. The County may enter into and utilize Mutual Aid Agreements as provided in Chapter 252, Florida Statutes in the event of emergency situations. The Purchasing Director shall be authorized to invoke the terms of the Mutual Aid Agreement.

Section 5.12 COOPERATIVE PURCHASING

The County may take advantage of cooperative purchasing agreements identified below when it is in the best interest of the County as determined by the award thresholds in Section 5. Whenever practicable, vendors will be encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the contracting process, when available. (Please see Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy).

- A. State Contracts. The County is authorized to purchase goods or services from authorized vendors listed on the respective state contracts (state term continuing supply contracts, SNAPS agreements [State Negotiated Agreement Price Schedules], agreements resulting from Invitations to Negotiate [ITN], or other such contracts authorized by statute for use by local governments) of the Florida Department of Management Services or other state agencies. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.
- B. Federal Supply Service. The County is authorized to purchase goods or services from authorized vendors listed on the eligible Federal Supply Schedules issued by the Federal General Services Administration. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.
- C. Collaborative Purchases with Other Public Procurement Units. The Purchasing Director, or designee shall have the authority to join with other units of government in cooperative purchasing ventures when the best interest of the County would be served thereby, and the same is in accordance with the County and State law. The Purchasing Director, or designee shall appropriately document such cooperative purchasing arrangements. All Cooperative Purchasing conducted under this section shall be through contracts awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.
- D. Other Governmental Entity Contracts (“Piggybacks”). The County is authorized to purchase goods or services from authorized vendors listed on eligible contracts of other governmental entities. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.

- E. Cooperative Purchasing Organizations. The County authorized to purchase goods or services from authorized vendors listed on eligible contracts of cooperative purchasing organizations. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy.

Section 5.13 PROTESTING INTENDED DECISIONS AND PROCUREMENT AWARDS

- A. Right to Protest. Any person, hereinafter referred to as Protestor, who submits a timely response to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, a multi-step sealed bid, or multi-step request for proposals under Sections 5.07, 5.08, 5.09, 5.09.1 or 5.09.2 of this Policy, and who is aggrieved with an Intended Decision of the County or a Procurement Award rendered by the Board of County Commissioners shall have the right to protest. Failure to protest an Intended Decision shall act as a bar to protest a subsequent Procurement Award that adopts the Intended Decision in all material respects.
1. Any Protestor wishing to protest an Intended Decision shall follow the procedures set forth in paragraphs B, C, and D of this Section.
 2. Any Protestor wishing to protest a Procurement Award shall follow the procedures in paragraphs B, C, and E of this Section.
- B. Filing a Protest. A Protestor shall file with the County a notice of intent to protest in writing within 72 consecutive hours after the posting of the notice of Intended Decision or Procurement Award of the County. A formal written protest shall be filed within 10 calendar days after the date the notice of intent to protest has been filed. Failure to timely file a notice of intent to protest or failure to file a formal written protest shall constitute a waiver of the right to proceedings under this Section.

A notice of intent to protest and the formal written protest are deemed filed with the County when it is received by the Purchasing Division.

1. The notice of intent to protest shall contain at a minimum: the name of the Protestor; the Protestor's address and phone number; the name of the Protestor's representative to whom notices may be sent; the name and bid number of the solicitation; and, a brief factual summary of the basis of the protest.
2. The formal written protest shall: identify the Protestor and the solicitation involved; include a plain, clear statement of the grounds upon which the protest is based; refer to the statutes, laws, ordinances, or other legal authorities which the Protestor deems applicable to such grounds; and, specify the relief to which the Protestor deems himself entitled.
3. A formal written protest shall include the posting of a bond with the Purchasing Division at the time of filing the formal written protest, made payable to the Board of County Commissioners, Leon County, in an amount equal to one percent (1%) of the County's estimate of the total dollar amount of the contract or \$5000, whichever is greater. If after completion of the bid protest process and any court proceedings, the County prevails, the County shall be entitled to recover all court costs provided under Florida law, but in no event attorney fees, which shall be included in the final order of judgment rendered by the court. Upon payment of such court costs by the Protestor, the bond shall be returned to him. After completion of the bid protest process and any court proceedings, if the Protestor prevails, the protestor shall be entitled to have his bond returned and he shall be entitled to recover from the County all court costs provided under Florida law, but in no event attorney fees, lost profits or bid preparation costs, which shall be included in the final order of judgment rendered by the court. In no case will the Protestor or Intervenor be entitled to any costs incurred with the solicitation, including bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.

4. Timeliness of protest determinations. All determinations on the timeliness of notices of intent to protest and formal written protests will be made by the Purchasing Director.

C. General Provisions

1. **Intervenor.** Any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, and who has a substantial interest in the Intended Decision or Procurement Award of the County, may be granted the right to intervene by order of the Chairperson of the Procurement Appeals Board or Special Master in response to a petition to intervene. A petition to intervene shall be filed within five calendar days of the filing of a formal written protest. Failure to timely file a petition to intervene shall constitute a waiver of all rights to intervene in the subject protest proceeding. Petitions to intervene will be considered by the Chairman of the Procurement Appeals Board, and any decision concerning a Petition to Intervene shall be made by the Chairman and shall be deemed final.
2. **Time Limits.** The time limits in which formal written protests shall be filed as provided herein may be altered by specific provisions in the invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposals or upon the mutual written consent of the Protestor and the County.
3. **Entitlement to Costs.** In no case will the Protestor or Intervenor be entitled to any costs incurred with the invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, including, but not limited to bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.
4. After a formal written protest has been filed with the Purchasing Director, the Protestor may not discontinue such appeal without prejudice, except as authorized by the Procurement Appeals Board or Special Master.
5. **Stay of Procurement During Protests.** In the event of a timely protest under Section 5.13(B) herein, the Purchasing Director shall not proceed further with the solicitation or award of the contract until all administrative remedies have been exhausted or until the County Administrator makes a written determination that the award of a contract without delay is necessary to protect the substantial interests of the County. Additionally, the County Administrator, or designee may execute an extension of current contract(s) to ensure the continuation of critical services.

D. Protest of Intended Decisions.

1. Upon timely receipt of a notice of intent to protest an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and a copy of this Section. The Purchasing Director shall within two business days mail a copy of the notice of intent to protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals.
2. Upon timely receipt of a formal written protest of an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and will notify the Chairman of the Procurement Appeals Board. The Purchasing Director shall within two business days mail a copy of the formal written protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals.

3. Procurement Appeals Board. There is hereby established a Procurement Appeals Board to be composed of a chairperson and two members and two alternates. The chairperson, members, and alternates of the Procurement Appeals Board shall be appointed by the County Administrator. The term of office of the chairperson, members, and alternates of the Procurement Appeals Board shall be three years. For the initial appointments, the County Administrator shall appoint the chairperson for a term of three years, one member and one alternate for a term of two years, and one member and one alternate for a term of one year so that a term of office expires every year. Thereafter, their successors shall be appointed for terms of three years, or for the balance of any unexpired term, but members may continue to serve beyond their terms until their successors take office. Members may be reappointed for succeeding terms.
 - a) The Purchasing Division is authorized to provide for the Procurement Appeals Board such administrative support as the Chairman requests in the hearing of formal written protests.
 - b) Acting by two or more of its members, the Procurement Appeals Board shall issue a decision in writing or take other appropriate action on each formal written protest submitted. A copy of any decision shall be provided to all parties and the Purchasing Director.
 - c) Procurement Appeals Board Proceeding Procedures
 - 1) The Procurement Appeals Board shall give reasonable notice to all substantially affected persons or businesses, including the Protestor, and any Intervenor.
 - 2) At or prior to the protest proceeding, the Protestor and/or Intervenor, as the case may be, may submit any written or physical materials, objects, statements, affidavits, and arguments which he/she deems relevant to the issues raised.
 - 3) In the protest proceeding, the Protestor, and/or Intervenor, as the case may be, or his representative or counsel, may also make an oral presentation of his evidence and arguments. Further, only reasonable direct and cross-examination of witnesses shall be permitted, at the discretion of the Chairman of the Procurement Appeals Board. The members of the Procurement Appeals Board may make whatever inquiries they deem pertinent to a determination of the protest.
 - 4) The judicial rules of evidence shall not strictly apply; however, witnesses shall be sworn, and any testimony taken under oath and, the members of the Procurement Appeals Board shall base their decision on competent, substantial evidence. The protest proceeding shall be de novo. Any prior determinations by administrative officials shall not be final or conclusive.
 - 5) Within seven (7) working days of the conclusion of the protest proceeding, the Procurement Appeals Board shall render a decision. The Procurement Appeals Board decision shall be reduced to writing and provided to the Protestor and/or Intervenor, as the case may be, and the County.
 - 6) Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

E. Protest of Procurement Awards; Special Master Proceedings.

1. Upon timely receipt of a notice of intent to protest a Procurement Award of the County, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and a copy of this Section. The Purchasing Director shall within one business day mail a copy of the notice of intent

- to protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals.
2. Upon timely receipt of a formal written protest of a Procurement Award of the County, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and will notify the County Attorney of the protest. The Purchasing Director shall within one business day mail a copy of the formal written protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals.
 3. Appointment of a Special Master. The County Administrator shall appoint and retain a special master or shall contract with the Florida Division of Administrative Hearings for an administrative law judge to act as a special master to conduct evidentiary proceedings regarding formal written protests of Procurement Awards. Each special master shall be a licensed attorney with the Florida Bar who has practiced law in Florida for at least five years, and who has experience in procurement law, local governmental law, or administrative law. Each special master appointed and retained by the County shall serve at the pleasure of the County Administrator and shall be compensated at a rate or rates to be fixed by the County Administrator. The expense of each special master proceeding shall be borne equally by the Protestor and the County.
 4. Ex parte communication.
 - a) No county employee, elected official, or other person who is or may become a party to a proceeding before a special master may engage in an ex parte communication with the special master. However, the foregoing does not prohibit discussions between the special master and county staff that pertain solely to scheduling and other administrative matters unrelated to the merits of the hearing.
 - b) If a person engages in an ex parte communication with the special master, the special master shall place on the record of the pending case all ex parte written communications received, all written responses to such communications, a memorandum stating the substance of all oral communications received, and all oral responses made, and shall advise all parties that such matters have been placed on the record. Any party desiring to rebut the ex parte communication shall be entitled to do so, but only if such party requests the opportunity for rebuttal within ten days after notice of such communication. If he or she deems it necessary due to the effect of an ex parte communication received by him, the special master may withdraw from the case.
 5. Powers of special masters. The special masters who conduct hearings pursuant to this section shall have the powers of hearing officers enumerated in F.S. § 120.569(2)(f), as amended.
 6. Prehearing requirements. At least fourteen days prior to the date set for the hearing, the parties shall exchange a list of names and addresses of witnesses planned to testify at the hearing, and a list of exhibits planned to be introduced at the hearing, as well as produce the physical exhibits for inspection by the parties. Each party is entitled to depose witnesses scheduled to testify at the evidentiary hearing.
 7. Hearings.
 - a) All hearings shall be commenced within 45 days of the date of the filing of the formal written protest. Requests for continuance by any party, either before or during the hearing, may be considered upon good cause shown.
 - b) All hearings shall be open to the public.

- c) The participants before the special master shall be the Protestor, the Protestor's witnesses, if any, county staff and witnesses, and any Intervenor. The participation of Intervenors shall be governed by the terms of the order issued by the special master in response to a petition to intervene. Intervention may only be permitted to any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject invitation to bid, request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, and who has a substantial interest in the Procurement Award.
- d) Testimony and evidence shall be limited to matters directly relating to the formal written protest. Irrelevant, immaterial, or unduly repetitious testimony or evidence may be excluded.
- e) All testimony shall be under oath. The order of presentation of testimony and evidence shall be as set forth by the special master.
- f) To the maximum extent practicable, the hearings shall be informal. All parties shall have the opportunity to respond, to present evidence and provide argument on all issues involved which are related to the formal written protest, and to conduct cross-examination and submit rebuttal evidence. During cross-examination of witnesses, questioning shall be confined as closely as possible to the scope of direct testimony and matters involving impeachment. The special master may call and question witnesses or request additional evidence as he or she deems necessary and appropriate.
- g) The special master shall render a final order on the formal written protest to the parties within ten days after the hearing concludes, unless the parties waive the time requirement. The final order shall contain written findings of fact and conclusions of law, which shall then be presented to the Board of County Commissioners for ratification or other final disposition.

Section 5.14 CONTRACT CLAIMS

- A. Authority to Settle Contract Controversies. This Section applies to controversies between the County and a contractor and which arise under, or by virtue of, a contract between them. This includes without limitation controversies based upon breach of contract, mistake, misrepresentation, or other cause for contract modification or rescission, where the contractor and County agree to utilize the provision of this section.
 - 1. The Purchasing Director is authorized to settle any controversy arising out of the performance of a County contract, prior to the commencement of an action in a court of competent jurisdiction up to \$10,000 in value.
 - a) If such a controversy is not resolved by mutual agreement, the Purchasing Director shall promptly issue a decision in writing. A copy of the decision shall be mailed or otherwise be furnished to the contractor immediately. The decision shall:
 - 1) State the reason for the action taken; and,
 - 2) Inform the Contractor of its right to administrative review as provided in this section.
 - b) If the Purchasing Director does not issue a written decision required in paragraph (a) of this subsection within 30 days after written request for a final decision, or within such longer period as may be agreed upon by the parties, then the contractor may proceed as if an adverse decision had been received.
 - c) The decision of the Purchasing Director may be appealed to the Procurement Appeals Board by the protestor by filing a formal written appeal with the Purchasing Director within five calendar days of receipt of the Purchasing Director's decision.

2. The Procurement Appeals Board is authorized to review any appeal of a decision on a contract controversy by the Purchasing Director or to hear any contract controversy in excess of \$10,000.
3. The Procurement Appeals Board shall promptly decide the contract or breach of contract controversy. The proceeding shall be de novo and shall follow the Proceeding Procedures contained in Section 5.13 (E)(3). Any prior determination by administrative officials shall not be final or conclusive.

Section 5.15 REMEDIES FOR SOLICITATIONS OR AWARDS IN VIOLATION OF LAW

- A. Prior to Bid Opening or Closing Date for Receipt of Proposals. If prior to the bid opening or the closing date for receipt of proposals, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation is in violation of federal, state, or local law or ordinance, then the solicitation shall be canceled or revised to comply with applicable law.
- B. Prior to Award. If after bid opening or the closing date for receipt of proposals, but prior to the award of contract, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation or a proposed award of a contract is in violation of federal, state, or municipal law or ordinance, then the solicitation or proposed award shall be canceled.
- C. After Award. If, after award, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation or award of a contract was in violation of applicable law or ordinance, then:
 1. If the person awarded the contract has not acted fraudulently or in bad faith:
 - a) the contract may be ratified and affirmed, provided it is determined that doing so is in the best interest of the County; or
 - b) the contract may be terminated, and the person awarded the contract shall be compensated for the actual costs reasonably incurred under the contract, plus a reasonable profit, prior to termination, but excluding attorney's fees; or
 2. If the person awarded the contract has acted fraudulently or in bad faith, the contract may be declared null and void or voidable, if such action is in the best interests of the County.

Section 5.16 OWNER DIRECT PURCHASES IN PUBLIC WORKS CONTRACTS

It is the policy of Leon County, Florida that all owner direct purchases for supplies and materials for use in public works projects be made in accordance with section 212.06(6) Florida Statutes and rule 12A-1.094 Florida Administrative Code, as they may be amended from time to time.

The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of owner direct purchases for supplies and materials for use in public works projects. In addition, the Purchasing Division shall provide training for project managers and other fiscal staff involved in contracts that may utilize owner direct purchases.

Section 5.17 EMPLOYMENT ELIGIBILITY AND VERIFICATION

- A. Federal statutes and executive orders require employers to abide by the immigration laws of the United States and to employ in the United States only individuals who are eligible to work in the United States. It is the policy of Leon County, Florida that unauthorized aliens shall not be employed nor utilized in the performance of contracted services for the County, in accordance with the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, as amended (8 U.S.C. § 1324a), and Subpart 22.18 of the Federal Acquisition Register.

B. Employment Eligibility Verification.

1. This section on employment eligibility verification (“E-Verify”) requirements shall apply to contractors and subcontractors performing contracted services for the County, where the contracted services are funded pursuant to federal grants, federal contracts, state grants, or state contracts.
2. Each Contractor and subcontractor, as defined in this section, shall agree to enroll and participate in the federal E-Verify Program for Employment Verification under the terms provided in the “Memorandum of Understanding” governing the program. Contractor further agrees to provide to the County, within thirty days of the effective date of this contract/amendment/extension, documentation of such enrollment in the form of a copy of the E-Verify “Edit Company Profile” screen, which contains proof of enrollment in the E-Verify Program (this page can be accessed from the “Edit Company Profile” link on the left navigation menu of the E-Verify employer’s homepage).
3. Contractor further agrees that it will require each subcontractor that performs work under this contract to enroll and participate in the E-Verify Program within sixty days of the effective date of this contract/amendment/extension or within sixty days of the effective date of the contract between the Contractor and the subcontractor, whichever is later. The Contractor shall obtain from the subcontractor(s) a copy of the “Edit Company Profile” screen, indicating enrollment in the E-Verify Program and make such record(s) available to the Agency upon request.
4. Contractor will utilize the U.S. Department of Homeland Security’s E-Verify system to verify the employment eligibility of: (a) all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida; and (b) all persons (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement.
 - a) Contractor must use E-Verify to initiate verification of employment eligibility for all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida within three business days after the date of hire.
 - b) Contractor must initiate verification of each person (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement within 60 calendar days after the date of execution of this contract or within 30 days after assignment to perform work pursuant to the Agreement, whichever is later.
5. Contractor further agrees to maintain records of its participation and compliance with the provisions of the E-Verify program, including participation by its subcontractors as provided previously, and to make such records available to the County or other authorized state entity consistent with the terms of the Memorandum of Understanding.
6. Compliance with the terms of this Employment Eligibility Verification provision is made an express condition of this contract and the County may treat a failure to comply as a material breach of the contract.

- C.** The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of this policy section. In addition, the Purchasing Division shall provide training for project managers and other staff involved in contracts that may utilize E-Verify requirements.

Section 6 CONTRACT ADMINISTRATION

The Purchasing Director or designee shall serve as the chief contract administrator for the County. The Purchasing Director shall establish administrative procedures, processes, and tools necessary for the implementation and conduct of a comprehensive contract administration program. In addition, the Purchasing Division shall provide initial contract administration training for project managers and update training as deemed necessary.

Section 6.1 CONTRACT PROVISIONS

- A. Standard Contract Clauses and Their Modification. The Purchasing Director, after consultation with the County Attorney, may establish standard contract clauses for use in County contracts. However, the Purchasing Director may, upon consultation with the County Attorney, vary any such standard contract clauses for any particular contract.

- B. Contract Clauses. All County contracts for supplies, services, and construction shall include provisions necessary to define the responsibilities and rights of the parties to the contract. The Purchasing Director, after consultation with the County Attorney, may propose provisions appropriate for supply, service, or construction contracts, addressing among others the following subjects:
 - 1. the unilateral right of the County to order, in writing, changes in the work within the scope of the contract;
 - 2. the unilateral right of the County to order, in writing, temporary stopping of the work or delaying performance that does not alter the scope of the contract;
 - 3. variations occurring between estimated quantities or work in contract and actual quantities;
 - 4. defective pricing;
 - 5. time of performance and liquidated damages;
 - 6. specified excuses for delay or nonperformance;
 - 7. termination of the contract for default;
 - 8. termination of the contract in whole or in part for the convenience of the County;
 - 9. suspension of work on a construction project ordered by the County;
 - 10. site conditions differing from those indicated in the contract, or ordinarily encountered, except that a differing site conditions clause need not be included in a contract:
 - a) when the contract is negotiated;
 - b) when the contractor provides the site or design;
 - c) when the parties have otherwise agreed with respect to the risk of differing site conditions.
 - 11. value engineering proposals.

Section 6.2 PRICE ADJUSTMENTS

- A. Methods of Price Adjustment. Adjustments in price during the term of a contract shall be computed in one or more of the following ways upon approval by the Board:
 - 1. by agreement on a fixed price adjustment before commencement of the pertinent performance or as soon thereafter as practicable;
 - 2. by unit prices specified in the contract or subsequently agreed upon;
 - 3. by the costs attributable to the events or situations under such clauses with adjustment of profit or fee, all as specified in the contract or subsequently agreed upon by the Board;
 - 4. in such other manner as the contracting parties may mutually agree; or

5. in the absence of agreement by the parties, by a unilateral determination by the County of the costs attributable to the events or situations under such clauses with adjustment of profit or fee as computed by the County, subject to the provisions of this section.

- B. Cost or Pricing Data Required. A contractor shall be required to submit cost or pricing data if any adjustment in contract price is subject to the provisions of this Section.

Section 6.3 CHANGE ORDERS/CONTRACT AMENDMENTS

- A. Change Orders. Change Orders are written documentation reflecting changes made to stipulations, condition, or terms of the contract during the contract period whether the contract is a capital improvement or a consultant services contract. There are two types of change orders that may be made to these contracts.

1. Field Change Order. This change order is identified in the original approved contract as a contingency and is referred to as a field change order. It is customary in more complex contracts to include a contingency for changes to the original contract through Field Change Orders. For contracts of less than \$1,000,000, a contingency may be included generally not to exceed 10% of the contract value, unless circumstances justify same. For contracts in excess of \$1,000,000, a contingency shall be included, but shall generally not exceed 5% of the original contract value, unless circumstances justify same.

When a contract is approved with such a contingency, the Project Manager with the concurrence of the respective Department Director or designee is authorized to approve one or more Change Orders up to the aggregate monetary value of the contingency. The contract must contain an approved contingency clause for this type of Field Change Order such as "The contract price includes a 5% or 10% (whichever is applicable) contingency amount for change orders that may be authorized at the discretion of the County."

Alternately, as a part of the project award recommendation, staff may propose an alternate amount for the level of pre-approved field Change Orders based upon the known complexity of the project; the certainty of unknown factors such as asbestos abatement or unknown conditions in rehabilitation; or other such factors for consideration by the Board.

2. Approved Change Order. Any Change Order, the cost of which exceeds the Field Change Order Threshold amount, or a Change Order which amends the scope of work or services in a significant manner, shall be considered by the County Administrator or designee. In the event a budget amendment is required, the procedures of the Office of Management and Budget shall apply to the amendment.

- B. Contract Amendments. Contract amendments, other than change orders, which provide for the alteration of specifications, delivery point, time, payments, quantity, or similar provisions of a contract without changing the scope of the project, may be approved by an appropriate person based upon the dollar value of the amendment. The purchasing categories' thresholds designated in Sections 5 through 5.09 shall govern the appropriate level of approval.

Section 6.4 ASSIGNMENTS OF CONTRACTS

No agreement made pursuant to any section of this policy shall be assigned or sublet as a whole or in part without the written consent of the County nor shall the contractor assign any monies due or to become due to the contractor hereunder without the previous written consent of the County.

Section 6.5 RIGHT TO INSPECT PLANT

The County may, at its discretion, inspect the part of the plant or place of business of a contractor or any subcontractor, which is related to the performance of any contract awarded, or to be awarded, by Leon County. The right expressed herein shall be included in all contracts or subcontracts that involve the performance of any work or service involving Leon County.

Section 7 RIGHTS OF BOARD OF COUNTY COMMISSIONERS

Nothing in this Policy shall be deemed to abrogate, annul, or limit the right of the Board in accordance with Florida law and in the best interests of the County, to reject all bids/proposals received in response to a solicitation, to determine in its sole discretion the responsiveness and responsibility of any bidder/proposer, to approve and authorize or to enter into any contract it deems necessary and desirable for the public welfare, or to vary the requirements of the Policy in any instance when necessary and desirable for the public welfare.

Section 8 COUNTY PROCUREMENT RECORDS

- A. Procurement Files. All determinations and other records pertaining to the solicitation, award, or performance of a contract shall be maintained for the County in appropriate files by the Purchasing Director.
- B. Retention of Procurement Records. All procurement records shall be retained and disposed of by the County in accordance with records retention guidelines and schedules established by the State of Florida.

Section 9 SPECIFICATIONS**Section 9.1 MAXIMUM PRACTICABLE COMPETITION**

All specifications shall be drafted to promote overall economy and encourage competition in satisfying the County's needs and shall not be unduly restrictive. This policy applies to all specifications including, but not limited to, those prepared for the County by architects, engineers, designers, and draftsmen.

Section 9.2 USE OF BRAND NAME OR EQUIVALENT SPECIFICATIONS

- A. Use. Brand name or equivalent specifications may be used when the Purchasing Director determines that:
 - 1. no other design, performance, or qualified product list is available;
 - 2. time does not permit the preparation of another form of purchase description, not including a brand name specification;
 - 3. the nature of the product or the nature of the County requirements makes use of a brand name or equivalent specification suitable for the procurement; or
 - 4. use of a brand name or equivalent specification is in the County's best interests.
- B. Designation of Several Brand Names. Brand name or equivalent specifications shall seek to designate three, or as many different brands as are practicable, as "or equivalent" references and shall further state that substantially equivalent products to those designated may be considered for award.
- C. Required Characteristics. Unless the purchasing agent determines that the essential characteristics of the brand names included in the specifications are commonly known in the industry or trade, brand name or equivalent specifications shall include a description of the particular design, functional, or performance characteristics required.
- D. Nonrestrictive Use of Brand Name or Equivalent Specifications. Where a brand name or equivalent specification is used in a solicitation, the solicitation shall contain explanatory language that the use of a brand name is for

the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.

- E. Determination of Equivalents. Any prospective bidder may apply, in writing, for a pre-bid determination of equivalence by the Purchasing Director. If sufficient information is provided by the prospective bidder, the Purchasing Director may determine, in writing and prior to the bid opening time, that the proposed product would be equivalent to the brand name used in the solicitation.
- F. Specifications of Equivalents Required for Bid Submittal. Vendors proposing equivalent products shall include in their bid submittal the manufacturer's specifications for those products, unless directed otherwise in the bid document. Brand names and model numbers are used for identification and reference purposes only.

Section 9.3 BRAND NAME SPECIFICATIONS

- A. Use of Brand Name Specifications. Since use of a brand name specification is restrictive of product competition, it may be used only when the Purchasing Director makes a determination that only the identified brand name item or items will satisfy the County's needs.
- B. Competition. The Purchasing Director or designee shall seek to identify sources from which the designated brand name item or items can be obtained and shall solicit such sources to achieve whatever degree of price competition is practicable. If only one source can supply the requirement, the procurement shall be made under Section 5.10, Single and Sole Source Purchases.

Section 10 ETHICS IN PUBLIC CONTRACTING

Section 10.1 CRIMINAL PENALTIES

To the extent that violations of the ethical standards of conduct set forth in this Section constitute violations of the State Criminal Code they shall be punishable as provided therein. Such penalties shall be in addition to civil sanctions set forth in this part.

Section 10.2 EMPLOYEE CONFLICT OF INTEREST

- A. Participation. It shall be unethical for any County employee to participate directly or indirectly in a procurement contract when the County employee knows that:
 1. the County employee or any member of the County employee's immediate family (father, mother, brother, sister, child, grandparent, or grandchild of employee or spouse) has a financial interest pertaining to the procurement contract; or
 2. any other person, business, or organization with whom the County employee or any member of a County employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement contract.
- B. Blind Trust. A County employee or any member of a County employee's immediate family who holds a financial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that financial interest.

Section 10.3 CONTEMPORANEOUS EMPLOYMENT PROHIBITED

It shall be unethical for any County employee who is participating directly or indirectly in the procurement process to become or to be, while such a County employee, the employee of any person contracting with the County.

Section 10.4 USE OF CONFIDENTIAL INFORMATION

It shall be unethical for any employee knowingly to use confidential information for actual or anticipated personal gain, or for the actual or anticipated personal gain of any other person.

Section 10.5 WAIVERS FROM CONTEMPORANEOUS EMPLOYMENT PROHIBITION AND OTHER CONFLICTS OF INTEREST

The County Administrator may grant a waiver from the employee conflict of interest provision or the contemporaneous employment provision upon making a written determination that:

- A. the contemporaneous employment or financial interest of the County employee has been publicly disclosed;
- B. the County employee will be able to perform his procurement functions without actual or apparent bias or favoritism; and
- C. the award will be in the best interest of the County.

Section 10.6 GRATUITIES AND KICKBACKS

- A. **Gratuities.** It shall be unethical for any person to offer, give, or agree to give any County employee, or for any County employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or performing in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, subcontract, or to any solicitation or proposal therefor.
- B. **Kickbacks.** It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.
- C. **Contract Clause.** The prohibition against gratuities and kickbacks prescribed in this section shall be conspicuously set forth in every contract and solicitation therefore.

Section 10.7 SANCTIONS

- A. **Employee Sanctions.** Upon violation of the ethical standards by an employee, the County Administrator, Purchasing Director, or other appropriate authority may:
 - 1. impose one or more appropriate disciplinary actions as defined in the County Personnel Rules and Regulations, up to and including termination of employment; and,
 - 2. may request investigation and prosecution.
- B. **Non-employee Sanctions.** The Board may impose any one or more of the following sanctions on a non-employee for violation of the ethical standards:
 - 1. written warnings;
 - 2. termination of contracts; or
 - 3. debarment or suspension as provided in Section 15.

Section 10.8 RECOVERY OF VALUE TRANSFERRED OR RECEIVED IN BREACH OF ETHICAL STANDARDS

- A. General Provisions. The value of anything being transferred or received in breach of the ethical standards of this policy by a County employee or a non-employee may be recovered from both County employee and non-employee.
- B. Recovery of Kickbacks by the County. Upon a showing that a subcontractor made a kickback to a prime contractor or a higher tier subcontractor in connection with the award of a subcontract or order there under, it shall be conclusively presumed that the amount thereof was included in the price of the subcontract or order and ultimately borne by the County and will be recoverable hereunder from the recipient. In addition, that amount may also be recovered from the subcontractor making such kickback. Recovery from one offending party shall not preclude recovery from other offending parties.

Section 11 FEDERAL REQUIREMENTS

Section 11.1 PATENTS

If a contract involving research and development, experimental, or demonstration work is being funded in whole or in part by assistance from a federal agency, then the contract shall include the following provisions.

- A. Notice to Contractor. The contract shall give notice to the contractor of the applicable grantor agency requirements and regulations concerning reporting of, and rights to, any discovery or invention arising out of the contract.
- B. Notice by Contractor. The contract shall require the contractor to include a similar provision in all subcontracts involving research and development, experimental, or demonstration work.

Section 11.2 FEDERAL PUBLIC POLICY REQUIREMENTS

- A. Applicability. If a contract is being funded in whole or in part by assistance from any federal agency, either directly or as a pass-through, the contract is subject to one or more federal public policy requirements such as:
 - 1. equal employment opportunity;
 - 2. affirmative action;
 - 3. fair labor standards;
 - 4. energy conservation;
 - 5. environmental protection; or
 - 6. other similar socio-economic programs.
- B. It is the policy of the Leon County Government to obtain commodities and services efficiently and effectively in free and open competition for the Federal Grant and Aid Programs (including Federal pass-through grants such as the Community Development Block Grant) through the use of sound procurement practices. All County staff and other persons (subgrantees or contractors) with designated responsibility for the administration of Federal Grant award contracts are responsible for ensuring compliance with all applicable federal and state laws and regulations. These include but are not limited to OMB Circular A-102, Attachment O; 2 CFR Part 200.317-.326; s. 255.0525, Florida Statutes; s. 287.055, Florida Statutes; s. 290.047, Florida Statutes; Chapter 73C-23, Florida Administrative Code; and, the Purchasing Policy of the Leon County Government and any subsequent revisions to any of the above laws, rules, and regulations.

- C. The County Purchasing Policy shall govern the procurement of commodities and services for the Federal Grant and Aid Programs except as provided in this section unless otherwise required in the grant award.
1. In the event of declaration of emergency by the Chairman of the Board, the Purchasing Policy shall be suspended, and the guidelines of Federal Regulation 2 CFR Part 200 shall be utilized, to include, but not be limited to procurement thresholds.
 2. Local Preference Program is not applicable to Federally funded programs.
 3. The Tallahassee-Leon County Office of Economic Vitality's Minority, Women, and Small Business Enterprise Policy is not applicable to Federally funded programs. Instead, the following affirmative steps shall be taken and documented to ensure that these firms are used when possible:
 - a) Place qualified small, minority, and women owned businesses on solicitation lists;
 - b) Assure that small, minority, and women owned businesses are solicited when they are potential sources;
 - c) Divide total requirement, when economically feasible, into smaller tasks or quantities to permit maximum participation by small, minority, and women owned businesses;
 - d) Establish delivery schedules, when requirements permits, which encourage participation by small, minority, and women owned business enterprises;
 - e) Use service and assistance from such organization as Small Business Administration (SBA) and the Minority Business Development Agency of the Department of Commerce; and
 - f) Require the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs a through e of this section.
 4. All procurement of commodities or services in excess of \$2,000 shall require a written agreement embodying all provisions and conditions thereof.
 5. All procurement of commodities or services in excess of \$2,000 and less than the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes may be entered into only after informal competition based on offers or quotes from not less than three (3) vendors, unless otherwise required in the grant or aid program.
 6. Publication of public notice for invitations to bid or requests for proposals and notification of the solicitation through distribution to potential bidders or offerors shall be required for all procurement in excess of the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes. The time frames in section 5.08 of this policy shall apply for the required public notice.
 7. Except as may otherwise be provided by law, procurement awards shall be made only on the basis of requirements and evaluation factors related to the price or quality of the commodities or services or to the ability of the prospective supplier or contractor to perform under the agreement. In evaluating the ability of a prospective contractor to perform, the County shall at a minimum consider the prospective contractor's record of past performance under similar federal grants.
 8. Nothing herein shall prohibit the County from utilizing a single source procurement (Section 5.10, Single and Sole Source Purchases) or procurement from another unit of government (Section 5.12, Cooperative Purchasing).
- D. Notice. The Purchasing Director shall include in the contract all appropriate provisions giving the contractor notice of these requirements. Where applicable, the Purchasing Director shall include in the contract provisions the requirement that the contractor give a similar notice to all of its subcontractors.

Section 12 INSURANCE REQUIREMENTS

- A. Minimum Requirements. Contractor shall purchase and maintain such insurance as will protect it from claims under Workers' Compensation laws, disability benefit laws or other similar employee benefit plans; from claims or damages because of bodily injury, occupational sickness or disease or death of its employees and claims insured by usual personal injury liability coverage in amounts determined by the provisions of the Risk Management Policy.
- B. Certificates of Insurance. Certificates of Insurance acceptable to the County shall be filed with the Purchasing Division prior to the commencement of the work and periodically thereafter upon any renewals during the term of the contract.
- C. Change of Insurance Requirements. The Board of County Commissioners reserves the right to change the insurance requirements based on the project scope, or when determined in the best interest of the County.

Section 13 BONDS AND DEPOSITS

When any of the following bonds is (are) required, the bond(s) will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the appropriate bond(s) is (are) accepted by the County.

Section 13.1 TYPES OF BONDS AND DEPOSITS:

- A. Combination Payment and Performance Bond - This type of bond is required for repairs, renovations, new construction, and other public works costing in excess of \$200,000. For projects less than that amount, it may be required at the discretion of the Purchasing Director or designee. When a payment and performance bond is required, the bond will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the payment and performance bond is accepted by the County.
- B. Performance Bond - For a project of an estimated value less than \$200,000, requirement of a performance bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to insure that a contract is carried out in accordance with the applicable specifications and at the agreed contract price.
- C. Payment and Material Bond - For a project of an estimated value less than \$200,000, requirement of a payment and material bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to protect the County from suits for non-payment of debts, which might be incurred by a contractor's performance for the County.
- D. Warranty Bonds - At the discretion of the Purchasing Director, after consultation with user departments, a Warranty Bond may be required from a successful bidder to insure warranty provisions are fulfilled.
- E. Guaranty of Good Faith Deposit (Bid Deposit) - For projects estimated to be less than \$200,000, requirement of a bid bond will be at the discretion of the Purchasing Director or designee. For purchases where it is determined by the Purchasing Director to be in the best interest of the County, and projects estimated to be \$200,000 or more, bidders will be required to submit with their bid or proposal a guaranty of good faith deposit. When in the best interest of the County, it is recommended by the Purchasing Director and approved by the County Administrator or his designee, these requirements may be waived.
 - 1. Return of Bond. Such deposit may not be withdrawn until a specified time after the proposals are opened and awards made. The deposit of the bond shall be retained by the Finance Officer of the Board until the Purchasing Director is satisfied that the Contractor's obligations have been satisfactorily completed.

2. Substitutes. In lieu of a surety bid bond, contractor may 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. Such deposits shall be retained by the Finance Officer of the Board until all provisions of the contract have been met.
- F. Irrevocable Letter of Credit. Upon approval of the Purchasing Director, a contractor may present an Irrevocable Letter of Credit from a national or state-chartered bank in lieu of any of the foregoing bonds for the same face value as required for the bond. The letter of credit shall be for a period of time not less than three months beyond the scheduled completion date of the purchase of the contracted services or materials.
 - G. Retention of Payments. The County may require the payment for a project, or a portion thereof, be withheld until the project has been completed as a method of protecting the County's interest. Retention may also be used in lieu of the above listed bonds. The solicitation documents shall specifically state if retention of any portion or all of the payment for the project is to be done.
 - H. Waiver of Bonds. When it is in the best interest of the County, the bonding requirements referenced in sections A – E above may be waived when 1) it is in the best interest of the County, and 2) it is recommended by the Purchasing Director and approved by the County Administrator or his designee.

Section 13.2 AMOUNT OF BOND OR DEPOSIT

- A. Amount of Bond. Bonds or deposits, which may be required, shall normally be in the following amounts, except as provided in the following subsection B.
 1. Performance Bond: 100% of contract price.
 2. Payment Bond: 100% of contract price.
 3. Payment and Performance Bond: 100% of contract price.
 4. Guaranty of Good Faith Deposit (Bid Deposit or Bond): The bid deposit will be 5% of the price bid by the vendor.
- B. Exceptions to Amount of Bond. Any of the previously listed bonds may be required at another amount recommended by the Purchasing Director and approved by the County Administrator or his designee when in the best interest of the County.

Section 13.3 PROCESSING OF BONDS AND DEPOSITS

- A. Responsibility for Securing Bonds. The contractor shall be responsible for securing the bond. Any costs may be included in the contract price.
- B. Licensure of Bonding Company. The company acting as surety for any bond issued shall be licensed to do business in the State of Florida.
- C. Review of Bonds by County Attorney. Surety bonds furnished will be reviewed by the County Attorney, who shall either accept or reject it for the Board. All surety bonds accepted shall be forwarded to the Finance Officer of the Board by the Purchasing Director to be filed in the official records of the Board.
- D. Failure to Provide Required Bond. In the event a contractor fails to provide an acceptable bond when required, within 10 days after notification, the County Attorney will be notified. Upon the recommendation of the County Attorney, the Board may declare the contract null and void, and retain in the account of Leon County any good faith deposits or guaranty which may have been submitted as liquidated damages under the terms of the solicitation.

- E. Filing of Bonds. Bonds, when accepted, shall be forwarded to the Finance Officer of the Board and shall be filed with the applicable contract documents.
- F. Deposits. Cash deposits (cashier's check, money orders, bank drafts, etc.) of all bidders shall be forwarded to the Finance Officer of the Board for deposit to the account of the Leon County Government. Upon award of contract, the Purchasing Director or designee shall be responsible for approving the return of deposits to unsuccessful bidders.
- G. Plans and Specification Deposit/Fees. The Purchasing Director is authorized to assess reasonable deposits and/or fees, not to exceed the cost of reproduction, for plans and specifications issued as a part of invitations for bids or requests for proposals. Deposits of all bidders for plans and specifications shall be forwarded to the Finance Officer of the Board for deposit to the account of the Leon County Government. Upon award of contract, the Purchasing Director or designee shall be responsible for approving the return of refundable deposits to unsuccessful bidders. Fees are to be deposited into the account from which applicable reproduction costs are paid.

Section 14 PAYMENT TO VENDORS

It is the policy of Leon County, Florida that payment for all purchases by the County be made in a timely manner in accordance with the provisions of the "Local Government Prompt Payment Act," sections 218.70 – 218.79, Florida Statutes.

The Purchasing Director, in conjunction with the Finance Director, shall establish administrative procedures, processes, and forms necessary for the implementation and administration of payments for all contracts under the requirements of the Local Government Prompt Pay Act. In addition, the Purchasing Division shall team with the Finance Department to provide accounts payable training for project managers and other fiscal staff involved in contracts and update training as deemed necessary.

Section 14.1 PAYMENT DISPUTE RESOLUTION

- A. In the event a dispute occurs between a contractor/vendor, herein referred to as vendor, and the County concerning payment of a payment request for construction work or an invoice for goods and/or services, the vendor should first attempt to resolve the issue with the Project Manager. If the dispute cannot be resolved between the vendor and the Project Manager within two business days of the dispute first being raised, the vendor may file a formal payment dispute. Formal payment dispute resolution shall be finally determined by the County, under this procedure in accordance with Florida Statute (FS) 218.76.
- B. Definitions. These definitions are specific to Section 14.1 of this policy.
 - 1. "Project Manager" is the Leon County employee responsible for managing the contract and approving payment requests and invoices related to the payment dispute.
 - 2. "Contract Manager" is the Leon County employee within the County Purchasing Division responsible for monitoring contracts. The Contract Manager serves as Chair of the Payment Dispute Resolution Committee.
- C. Filing a Dispute. Any vendor shall file with the Contract Manager in the County Purchasing Division a formal notice of payment dispute in writing within two (2) business days of the dispute first being raised.
 - 1. The notice of payment dispute shall contain at a minimum: the name of the vendor; the vendor's address and phone number; the name of the vendor's representative to whom notices may be sent; the contract number associated with the payment dispute; and, a brief factual summary of the basis of the dispute.
 - 2. Waiver. Failure to timely file a written payment dispute shall constitute a waiver of proceedings under this section.

3. Upon timely receipt of a formal payment dispute, the Contract Manager shall provide the vendor with acknowledgement of receipt, will notify the Payment Dispute Resolution Committee, and will coordinate with all parties to establish the date and time for a Payment Dispute Resolution Proceeding.

D. General Provisions

1. Time Limits. Proceedings to resolve the dispute shall be commenced not later than 45 calendar days after the date on which the payment request or proper invoice (as specified in the contract document) was received by the County and shall be concluded by final decision of the County not later than 60 calendar days after the date on which the payment request or proper invoice was received by the County.
2. Protest. Dispute resolution procedures shall not be subject to chapter 120, and such procedures shall not constitute an administrative proceeding, which prohibits a court from deciding de novo any action arising out of the dispute.
3. Interest. If the dispute is resolved in favor of the County, then interest charges shall begin to accrue 15 calendar days after the County's final decision. If the dispute is resolved in favor of the vendor, then interest shall begin to accrue as of the original date the payment became due.
4. Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

E. Payment Dispute Resolution Proceeding Process

1. All formal payment disputes shall be presented to the Payment Dispute Resolution Committee. The committee shall be comprised of the Contract Manager, Purchasing Director, and appropriate Division Director for the County or their designees.
2. Within three (3) business days of timely receipt of a formal notice of payment dispute, the Contract Manager shall schedule a proceeding before the Payment Dispute Resolution Committee to include all substantially affected persons or businesses, including the vendor and County project manager. Non-appearance by the vendor shall constitute a forfeiture of proceedings with prejudice.
3. At or prior to the dispute proceeding, the vendor and project manager, may submit any written or physical materials, objects, statements, affidavits, and arguments which he/she deems relevant to the payment dispute.
4. In the proceeding, the vendor and project manager, or his representative or counsel, may also make an oral presentation of his evidence and arguments. Further, only reasonable direct and cross-examination of witnesses shall be permitted, at the discretion of the Chairman of the Payment Dispute Resolution Committee. The members of the Payment Dispute Resolution Committee may make whatever inquiries they deem pertinent to a determination of the dispute.
 - a) The judicial rules of evidence shall not strictly apply; however, witnesses shall be sworn, and any testimony taken under oath and, the members of the Payment Dispute Resolution Committee shall base their decision on competent, substantial evidence. The proceeding shall be de novo. Any prior determinations by administrative officials shall not be final or conclusive.
 - b) Within three business days of the conclusion of the proceeding, the Payment Dispute Resolution Committee shall render a decision. The Payment Dispute Resolution Committee decision shall be reduced to writing and provided to the vendor and the County project manager. The decision of the Payment Dispute Resolution Committee shall be final and conclusive for all disputes valued less than \$100,000.
 - c) For those disputes valued above \$100,000, the Payment Dispute Resolution Committee shall file a Recommended Agency Order for approval by the County Administrator or his designee.

Section 15 AUTHORIZATION TO DEBAR OR SUSPEND VENDOR(S)

- A. Suspension. After consultation with the County Attorney, the Purchasing Director is authorized to suspend a person from consideration for award of contracts if there is probable cause to believe that the person has engaged in any activity, which might lead to debarment. The suspension shall be for a period not to exceed three (3) months, and the Purchasing Director shall immediately inform the Board and provide notice to the affected person.
- B. Debarment. After reasonable notice and a reasonable opportunity for the suspended person to be heard, the Board shall either disbar such person or terminate the suspension. The debarment should be for a period of not more than three (3) years.
- C. Causes for Debarment. The causes for debarment include:
1. entry of a plea of guilty, no contest, or nolo contendere to or conviction 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;
 2. entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal statutes of 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 responsibility as a County contractor;
 3. entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal antitrust statutes arising out of the submission of bids or proposals;
 4. violation of contract provisions, as set forth below, of a character which is regarded by the Board to be so serious as to justify debarment action:
 - a) deliberate failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or
 - b) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for debarment;
 5. having been adjudicated guilty of any violation by the Leon County Contractor's Licensing Board, or the State of Florida Construction Industry Licensing Board within the past twelve (12) month period at the time of bid submittal;
 6. having been adjudicated guilty by the Leon County Code Enforcement Board of any violation of an environmental ordinance within the past six (6) month period at the time of bid submittal; and
 7. any other cause the Purchasing Director or Board determines to be as serious and compelling as to affect responsibility as a County contractor, including debarment by another governmental entity.
- D. Notice of Decision. The Purchasing Director shall issue a written notice to the person of the decision to debar or suspend. The decision shall state the reasons for the action taken and inform the debarred or suspended person involved of his/her rights concerning judicial or administrative review. The written decision shall be mailed or otherwise furnished immediately to the debarred or suspended person.

Section 15.1 APPEAL OF DECISION TO DEBAR OR SUSPEND

The Board's decision to debar or suspend a person or business shall be final and conclusive, unless the debarred person commences a timely action in court in accordance with applicable law.

Revised July 13, 2021

Leon County Government

Leon County, Florida

Policy No. 96-1

Title: Purchasing Policy

Date Adopted: ~~July 13, 2021~~October 8, 2024

Effective Date: ~~July 13, 2021~~October 8, 2024

Reference: Chapters 274 and 287, Florida Statutes

Policy Superseded: Policy No. 96-1, "Purchasing Policy"; adopted January 16, 1996; revised November 25, 1997; February 24, 1998; March 22, 2005; December 13, 2005; June 13, 2006; February 26, 2009; October 27, 2009; February 9, 2010; March 23, 2010; October 12, 2010; June 14, 2011; August 23, 2011; November 8, 2011; February 14, 2012; March 13, 2012; February 12, 2013; October 29, 2013; January 27, 2015; June 20, 2017; November 12, 2019; February 25, 2020; July 13, 2021

It shall be the policy of the Leon County Government, that Policy No. 96-1, "Purchasing Policy", revised by the Board of County Commissioners on ~~February 25, 2020~~July 13, 2021 is hereby further amended, and a revised policy is hereby adopted in its place, to wit:

LEON COUNTY GOVERNMENT

Purchasing Policy



LEON COUNTY GOVERNMENT
Purchasing Policy

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Section 1 PURPOSE

~~This policy is adopted to promote the following purposes:~~

- ~~A. To simplify, clarify, and modernize the procurement practices used by the Leon County Government.~~
- ~~B. To promote the continued development of professional and equitable procurement policies and practices.~~
- ~~C. To promote public confidence in the purchasing procedures followed by Leon County.~~
- ~~D. To ensure the fair and equitable treatment of all persons who deal with the procurement system of Leon County.~~
- ~~E. To encourage the growth of small and minority businesses through the promotion of an atmosphere conducive to the development and maintenance of small, minority and women-owned business participation in the County's procurement system.~~
- ~~F. To maximize economy in Leon County procurement activities and to maximize to the fullest extent practicable the purchasing value of public funds of Leon County.~~
- ~~G. To provide safeguards for the maintenance of a procurement system of quality and integrity in Leon County.~~

~~The purpose of this Purchasing Policy is to establish specific directions and guidelines for all County Departments, and employees of Leon County to use in procuring goods and services for a public purpose. This policy aims to promote fair competition, maximize value for taxpayers, and maintain high-quality standards for goods and services procured. This policy will serve as a guiding framework ensuring cost-effectiveness, quality assurance, and compliance with all relevant laws, rules, and regulations.~~

Section 2 Section 7—RIGHTS OF BOARD OF COUNTY COMMISSIONERS

Nothing in this Policy shall be deemed to abrogate, annul, or limit the right of the Board in accordance with Florida law and in the best interests of the County, to reject all bids/proposals received in response to a solicitation, to determine in its sole discretion the responsiveness and responsibility of any bidder/proposer, to approve and authorize or to enter into any contract it deems necessary and desirable for the public welfare, or to vary the requirements of the Policy in any instance when necessary and desirable for the public welfare.

Section 3 APPLICATION OF POLICY

- A. Contracts: This policy shall apply to contracts/agreements solicited or entered into after the effective date of this policy or subsequent amendments or revisions, unless the parties agree to its application to a contract solicited or entered into prior to the effective date.
- B. Activities: ~~This policy shall apply to the purchase/procurement of all materials, supplies, services, construction and equipment except as herein specifically exempted. The provisions of this policy shall apply to every purchase of goods and services by the County, unless exempted herein or an alternative purchasing procedure is required by federal or state law grant provisions.~~
- C. Exemptions from the Purchasing Policy. The following exemptions do not preclude the County from utilizing competitive procurement practices where possible. The following types of purchasing activities shall be exempt from ~~the purchasing policy~~competitive procurement processes except as noted:
 - 1. ~~All 1.~~ All heavy equipment repairs shall be exempted from the competitive sealed bid requirements. ~~The Fleet Division Management Director~~ or designee shall solicit and evaluate quotations and make a recommendation for award. The Purchasing Director shall review the quotations and the recommendation for award and award of the bid shall be made by the appropriate authority as provided in Section ~~65.0~~.

2. –All purchases of services from a utility whose rates are determined and controlled by the Public Service Commission or other governmental authority, including but not limited to postage, electricity, water, sewer, telephone, and cable television services.
3. –All supplies, materials, equipment, or services purchased at a price established in any of the authorized forms of state contracts of the State of Florida Department of Management Services, Division of Purchasing; under the terms and conditions of a cooperative purchasing agreement or term contract by other governmental units, or through other cooperative purchasing organizations.
4. –All –supplies, and materials, equipment, construction, or services purchased from another unit of government not otherwise limited or prohibited by law.

5. Service/Maintenance Contracts: Continuing service and/or maintenance contracts that are initially awarded as a part of product acquisition/installation to a vendor who is the manufacturer, developer, or who is the authorized service agent thereof and for which funds are annually appropriated in the budget are exempt from further competitive requirements of this policy. Examples are software/hardware maintenance, building systems maintenance, [right-of-way maintenance agreements](#), security systems, etc.
6. Real property, real estate brokerage, options of title or abstracts of title for real property, title insurance for real property, and other related costs of acquisition, rental, or sale of real property.
7. All purchases of used equipment having a value of \$50,000 or less; however, each such purchase shall be supported by one equipment appraisal report from the vendor.
8. All purchases of used equipment having a value greater than \$50,000 and less than \$100,000; however, each such purchase shall be supported by two independent equipment appraisal reports.
9. Library Media and Materials [\(both digital and printed\)](#). The purchase of library books, education and/or personnel texts, textbooks, printed instructional materials, reference books, periodicals, databases, indexes, pre-recorded library media materials, e.g. audio and video cassettes, film strips, films, sound recordings, computer software, etc., and printed library cards that are to be a part of the library collection [are exempt](#).
- ~~104.~~ Advertisements [_\(except Delinquent Tax Notices\)_](#).
- ~~112.~~ Training Media and Services. When such materials or services are available only from the producer, publisher, owner of the copyright or patent, educational institution or training service provider, which developed the training program, the purchase, is exempt from competitive requirements. Approval thresholds in Section ~~65.0~~ shall apply.
- ~~123.~~ ~~_~~Software. Upgrades, software modification services by the copyright holder, [maintenance agreements](#), and related software enhancements to installed software purchased through competitive means [or otherwise awarded](#) are exempt. The purchase of new software packages or systems shall follow the thresholds and procedures of the policy to ensure competitive selection.
- ~~134.~~ Corporate and media sponsorship agreements [_ up to the formal bid threshold in Section 5.0_](#).
- ~~145.~~ Licensed health professionals, e.g., Doctors, Nurses, Veterinarians who provide service directly to patients.
- ~~156.~~ [Continuing education events or programs](#). Training and educational courses, contracts between the County and governmental entities or nonprofit corporations, dues or memberships, publications, meeting rooms, and hotels when any of the procurements listed previously are below the formal bid threshold in Section ~~65.0~~.
- ~~167.~~ Lectures by individuals.
- ~~178.~~ Artistic services [_; Music, entertainment, creative writing, photography, digital art, fireworks, works of art for public places,](#) and art design and conservation services.
- ~~189.~~ [Contracts between the County and governmental entities or nonprofit corporations](#). ~~Continuing education events or programs.~~

1920. Services of legal counsel authorized by the Office of the County Attorney, including, but not limited to, attorney, expert witnesses, conflict counsel, court reporters, paralegal, mediator, and other services required by the Office of the County Attorney.
201. Travel arrangements and expenses. (Reference ~~Travel~~ Policy No. 09-1, Travel).
212. Tourism Event Hosting Applications/Requests/Bids. (Reference Policy No. 21-6, County Tourism Policy)
223. Revenue Generating contracts.
23. Tourism- related services, goods, or commodities authorized by the County Administrator or designee, including, but not limited to, special event bids/applications/requests, advertising, sponsorships, consignment agreements for items and products in County Tourism's Visitor Information Center, and other services, goods, or commodities as required to promote Leon County as a destination to visitors and event organizers. (Reference Policy No. 21-6, County Tourism Policy).
244. Food, to include water and beverages, may be purchased with an explanation of the public purpose. (Reference ~~Food~~ Policy No. 04-6, Policy for Purchases of Food, Beverages, and Supplies).
25. Grants (Direct Payment) by the County and social services (e.g. burials, reimbursable emergency assistance payments to approved social service agencies, down payment assistance, temporary housing relocation expenses and indigent medical and tubercular care patient services).
26. Employee recruitment services that include, but are not limited to, temporary employment services, recruitment or headhunter services, and job posting services.
27. Purchases made with a Purchasing Card pursuant to Leon County Purchasing Card Policy No. 00-07.
285. Any other commodities or contractual services listed in Section 287.057 (3) ef., Florida

Statutes. D. Utilization of Minority, Women, and Small Business Enterprises

Leon County procurement activities will be conducted in compliance with the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy as adopted by the Leon County Board of County Commissioners on February 25, 2020 and as amended. Employees are encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the procurement process, when available.

Whenever practicable, at least one of the three quotes/bids from certified minority, women, and small business enterprises shall be secured for Small Purchases, Field Quotes, Purchasing Quotes, and Informal Bids. The Purchasing Director or designee shall review the quotations and make the award or require additional quotations/bids prior to award.

E. Environmentally Preferred Purchasing

1. The County will seek to increase acquisition and utilization of environmentally preferred products and services, consistent with price, performance, availability and safety considerations. Environmentally preferred purchases are products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose.

2. The County may consider paying a reasonable premium for environmentally preferred products and services.
3. Any vendor contracting with the County is encouraged to purchase products or materials with recycled content when those products or materials are available at reasonable prices within a reasonable period of time unless the products or materials fail to meet reasonable performance standards.

Section 43 DEFINITIONS

A. The following terms defined in this section shall have the meanings set forth below whenever they appear in this policy:

1. —"Addendum" is a written document used during the procurement process to expand or more fully explain the terms of a solicitation instrument (Invitation to Bid or Request for Proposals). An addendum is not to be confused with a contract "amendment."
2. "Agreement/Contract" means all types of Leon County agreements, regardless of what they may be called, for the purchase or disposal of supplies, services, materials, equipment, or construction and which name the terms and obligations of the business transaction.
3. "Amendment" means an agreed addition to, deletion from, correction, or modification of a document or contract.
4. "Bidder/Proposer/Offeror" is any individual, partnership, firm, or corporation, acting directly or through a duly authorized representative, sole proprietor, joint venture, or any other legal entity, who submits a bid or proposal for the goods or services contemplated.
53. "Blanket Purchase Order" means a purchase order issued to a vendor for an amount not to exceed the face value of the purchase order. A blanket purchase order is for the procurement of commodities or services no single item of which shall exceed the threshold for small purchases unless the appropriate method of procurement was used to generate the Blanket Purchase Order.
64. "Board" means the Board of County Commissioners of Leon County, Florida.
75. —"Brand Name or Equivalent Specification" means a specification limited to one or more items by manufacturers' names or catalogue numbers to describe the standard of quality, performance, and other salient characteristics needed to meet the County requirements, and which provides for the submission of equivalent products.
86. "Business" means any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture, or any other private legal entity.

97. —"Change Order" means a written order amending the scope of, or correcting errors, omissions, or discrepancies in a contract or purchase order which is signed by the Contractor and approved in accordance with authorization levels.
108. "Commodity" means a product that the County may contract for or purchase for the use and benefit of the County. A specific item, it is different from the rendering of time and effort by a provider.
- ~~9. "Competitive Sealed Bidding" (Invitation for Bid) means a written solicitation for sealed competitive bids used for the procurement of a commodity, group of commodities, or services valued more than the threshold for this category. The invitation for bids is used when the County is capable of specifically defining the scope of work for which a contractual service is required or when the County is capable of establishing precise specifications defining the actual commodity or group of commodities required.~~
11. "Consignment Agreement" means an agreement whereby the consignor delivers specified goods to the consignee for use or sale.
120. "Construction" means the process of building, attaining, repairing, improving, or demolishing any public structure or building, or other public improvement of any kind to any public real property. It does not include routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property.
13. "Continuing Contract" means a contract that allows for incremental execution using individual task orders or work orders.
141. "Contract amendment or modification" means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual action of the parties to the contract.
15. "Contract Administrator" is the Leon County employee within the County Purchasing Division responsible for oversight and monitoring of contracts.
16. "Contract Manager" is the Leon County employee responsible for managing the contract, approving payment requests and invoices, and handling payment disputes.
172. "Contractor" means any person having a contract with Leon County (not to include employment contracts).
183. "Contractual Services" means the rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors, and such services may include, but are not limited to, evaluations; consultations; maintenance; accounting; security; management systems; management consulting; educational training programs; research and development studies or reports on the findings of consultants engaged there under; and professional, technical, and social services.
194. "Contractual Services Contract" is a contract for a contractor's time and effort rather than the furnishing of specific commodities. Satisfactory completion of the service and/or a specified period of time or date completes such contract.
2045. "Cooperative Purchasing" is procurement conducted by, or on behalf of, more than one public procurement unit.
2146. "Cost Analysis" is the evaluation of cost data for the purpose of arriving at costs actually incurred or estimates of costs to be incurred, prices to be paid, and costs to be reimbursed.

2217. "Data" means recorded information, regardless of form or characteristic.
2318. "Definite Quantity Contract" is a contract whereby the contractor(s) agrees to furnish a specific quantity of an item or items at a specified price and time to specified locations. Delivery by the vendor and acceptance of the specific quantity by the County completes such contract.
2419. "Designee" means a duly authorized representative of a person holding a superior position.
250. "Emergency" means when there exists a threat to public health, welfare, or safety; natural or unnatural, unexpected events; accidents; or loss to the County under emergency conditions which shall be considered to mean those situations where the operation of a department or division would be seriously impaired if immediate action were not taken.
261. "Emergency Purchase" is a purchase necessitated by a sudden unexpected turn of events (e.g. acts of God, riots, fires, floods, accidents or any circumstances or cause beyond the control of agency in the normal conduct of its business) where the delay incident to competitive bidding would be detrimental to the interests of the County.
272. "Employee" means an individual drawing a salary from Leon County, whether elected or non-elected. For the purposes of this policy, it also means that any non-compensated individual performing personal services for Leon County is to be governed by these rules.
283. "Established Catalog Price" is the price included in a catalog, price list, schedule, or other form that:
- is regularly maintained by a manufacturer or contractor;
 - is either published or otherwise available for inspection by customers; and
 - states prices at which sales are currently or were last made to a significant number of any category of buyers or those buyers constituting the general buying public for the supplies or services involved.
- ~~24. "Field Quotes" is the procurement procedure used by the operating department or divisions to purchase commodities or contractual services with a value within the threshold amounts set for this category and are conducted by the department or division.~~
- ~~25. "f.o.b. or FOB (free on board)" is a term used in conjunction with an identified physical location to determine the responsibility and basis for payment of freight charges, and the point at which title for the shipment passes from seller to buyer. Commonly used deliveries are:~~
- ~~FOB Destination. A shipment to be delivered to a destination designated by the buyer and the point at which buyer accepts title.~~
 - ~~FOB Shipping Point (Origin). A shipment is to be delivered to the buyer with passage of title, on board the indicated conveyance or carrier at the contractor's designated facility.~~
296. "Gratuity" is a payment, loan, subscription, advance, deposit of money, service, or anything of more than nominal value, present or promised, inuring to the benefit of an employee, unless consideration of substantially equal or greater value is given by the employee.
30. "Home Office" is a business's principal office or headquarters constituting the center for administration and policymaking.
3127. "Informal Sealed Bid" is a written solicitation method used by the County for securing prices and selecting a provider of commodities or services with a value within the threshold for this category.
2328. "Intended Decision" means a written notice that states the firm or firms to whom the County intends to award a contract resulting from a solicitation and which establishes the period in which a notice of intent to protest may be timely filed. The Intended Decision is posted on the County website and on the

Public Notice board in the Purchasing Division.

2339. "Invitation for Bid" (~~Competitive Sealed Bidding~~) means a written solicitation for sealed competitive bids used for the procurement of a commodity, group of commodities, or services valued more than the threshold for this category. The invitation for bids is used when the County is capable of specifically defining the scope of work for which a contractual service is required or when the County is capable of establishing precise specifications defining the actual commodity or group of commodities required.

34. "Invitation to Negotiate" (ITN) means a solicitation which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the agency may negotiate in order to receive the best value.

~~"Invitation to Negotiate" (ITN) means a solicitation which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the agency may negotiate in order to receive the best value.~~

351. "Joint Venture" means:

- a) a combination of contractors performing a specific job in which business enterprises participate and share a percentage of the net profit or loss; or
- b) a joint business association of a minority individual(s)/firm(s) as defined herein, and a non-minority individual(s)/firm(s) to carry out a single business enterprise for which purpose the individuals/firms combine their property, money, efforts, skills and/or knowledge.

362. "Local Business" means a business which:
- a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six months immediately prior to the issuance of the request for competitive bids or request for proposals by the county; and
 - ~~b) Holds any business license required by Leon County, and, if applicable, the City of Tallahassee; and~~
 - ~~eb)~~ Is the principal offeror who is a single offeror; a business that is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.
373. _-"Manufacturer" means a person or firm engaged in the process of making, fabricating, constructing, forming, or assembling a product(s) from raw, unfinished, semi-finished, finished, or recycled materials through a direct contract/agreement on behalf of the general contractor.
384. _-"Minor Irregularity means a variation from solicitation terms and conditions which does not affect the price of the solicitation of the quality of services sought, give the bidder/proposer an unfair advantage over other bidders/proposers, or adversely impact the interests of the County.
395. "Option to Renew" means a contract clause that allows a party to reinstate the contract for an additional term.
4036. "Person" means any business, individual, committee, club, other organization, or group of individuals.
4137. "Pre-Bid Conference" (or Pre-Proposal Conference) means a meeting held with prospective bidders prior to solicitation of or the date for receipt of bids or proposals, to recognize state of the art limits, technical aspects, specifications, and standards relative to the subject, and to elicit expertise and bidders' interest in submitting a bid or pursuing the task.
4238. "Procurement Award" is an award of a contract for goods or services resulting from a solicitation through action by the Board of County Commissioners in a public meeting.
4339. "Professional Services" means those services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined by the State of Florida, or those performed by any architect, professional engineer, landscape architect, or registered land surveyor in connection with his professional employment or practice.
44. "Project Manager" is the Leon County employee responsible for managing the obligations and technical scope of the project.
450. "Purchase Order" means that document used by Leon County to request that a contract be entered into for a specified need, and may include, but not be limited to, the technical description of the requested item, delivery schedule, transportation, criteria for evaluation, payment terms, and other specifications.
461. _-"Purchasing" means buying, procuring, renting, leasing, or otherwise acquiring any materials, supplies, services, construction, or equipment. It also includes all functions that pertain to the obtaining of any material, supplies, services, construction, and equipment, including description of specifications and requirements, selection and solicitation of resources, preparation, and award of contract.
47. "Purchasing Card (P-Card)" means a Commercial Card that allows organizations to take advantage of the existing credit card infrastructure to make electronic payments for a variety of business expenses.
482. "Purchasing Director" means the Leon County employee duly authorized to enter into and administer contracts and make written determinations with respect thereto under the terms of the

purchasing policies of the Leon County Government.

493. "Purchasing Quotes" is the procedure used to purchase commodities or contractual services which cost within the range authorized for purchasing quotes in Section 6, shall require competitive quotations from three or more vendors. The quotations may be obtained by the operating department/division or the Purchasing Division and shall be reviewed by the Purchasing Director or designee. wherein the Purchasing Director or Purchasing Agents obtain either written or oral quotations from three or more vendors for purchases within the threshold amounts set for this category.
5044. "Recycled Content" means materials that have been recycled and are contained in the products or materials to be procured, including, but not limited to, paper, plastic, aluminum, glass, and composed materials. The term does not include internally generated scrap that is commonly used in industrial or manufacturing processes or waste or scrap purchased from another manufacturer who manufactures the same or a closely related product.
5145. "Regulation" means a statement by the Board of County Commissioners having general or particular applicability and future effect, designed to implement, interpret, or prescribe law, policy, or practice.
5246. "Request for Information" means a written or electronically posted request to vendors for information concerning commodities or contractual services. Responses to these requests are not offers and may not be accepted to form a binding contract.
5347. "Request for Proposals" (RFP) means a written solicitation for sealed proposals with the title, date, and hour of public opening designated. The request for proposals may be used when the County is unable to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required, when the qualifications and quality of service are considered the primary factors instead of price, and when the County is requesting that a qualified offeror propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document.
5448. "Request for a Quote" means a solicitation that calls for pricing information for purposes of competitively selecting and procuring commodities and contractual services from qualified or registered vendors.
5549. "Responsible bidder or offeror" means a person who has the capability, in all respects, to perform fully the contract requirements, and the integrity and reliability, which will assure good faith performance.
560. "Responsive bidder or offeror" means a person who has submitted a bid, which conforms in all material respects to the Invitation to Bid or the Request for Proposals.
571. "Revenue Generating Contract" means a contract where revenue is received for goods and services provided on behalf of governmental entities.
582. "Services" means the furnishing of labor, time, or effort by a contractor, not involving the delivery of a specific end product other than those which is not defined as supplies and which are merely incidental to the required performance. This term shall not include employment agreements or collective bargaining agreements.
594. "Service Contract" means a written contract for the performance of services over a fixed period of time or for a specified duration.
605. "Small Business Enterprise" means a firm whose SBE certification is recognized, effective, and accepted by the MWSBE Division of the Office of Economic Vitality.

~~615653~~. "Small Purchases" means the procurement of commodities or services with a value within the thresholds set for this category without the requirement of quotes, bids, or public notice under procedures established by the Purchasing Division.

~~625764~~. "Single Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from one available practical source of supply because of standardization, warranty, or other factors, including, but not limited to, the continuation of previous Services or additional service even though other competitive sources may be available. A Single Source may be declared such by Leon County~~the Board of County Commissioners~~ for reasons acceptable to it.

~~635875~~. "Sole Source Purchase" means the purchase of a commodity, service, equipment, or construction item(s) from only one available practical source of supply because of an inability to obtain competition, proprietary-

technology, copyright, or a supplier's unique capability. A Sole Source may be declared such by Leon County~~the Board of County Commissioners~~ for reasons acceptable to it.

~~645986~~. -"Specification" means any description of the physical or functional characteristics of the nature of a material, supply, service, construction, or equipment item. It may include a description of any requirement for inspection, testing, recycled, or degradable materials content, or preparing a material, supply, service, construction, or equipment item for delivery.

~~59656057~~. "Supplier" means a person or firm who engages in the selling of materials and supplies to contractors, subcontractors, and/or manufacturers for the purpose of constructing, repairing, altering, remodeling, adding to or subtracting from or improving any building, structure. or property through a direct contract/agreement on behalf of the general contractor.

~~661058~~. "Tangible Personal Property" is defined as property which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment.

~~672159~~. "Term Contract" means indefinite quantity contract whereby a contractor(s) agrees to furnish an item or items during a prescribed period of time (such as 3, 6, 9, 12 months or a specific date). The specified period of time or date completes such contract.

~~68320~~. "Tie (Identical) Bid" is when two or more bids are equal with respect to price and it appears that the quality and service offered by the vendors are otherwise comparable.

~~69431~~. "Tourism Event Hosting Application/Request/Bid" means the process utilized by the Tourism Department when applying to organizations to host tourism events.

Section 54 AUTHORITY OF PURCHASING DIRECTOR

- A. The Purchasing Director shall serve as the central purchasing officer of Leon County.
- B. -The Purchasing Director shall develop and administer operational procedures implementing this policy and for governing the internal functions of the Division of Purchasing.
- C. Except as otherwise specifically provided in this policy, the Purchasing Director, or his/her designee, shall, in accordance with regulations promulgated by the Leon County Government:
 1. Purchase or supervise the purchase of all supplies, services, materials, equipment, and construction

services defined within the scope of this policy.

2. Operate a central warehouse for the purchasing, in bulk, of items that may be more economically bought and distributed than when purchased on an individual basis; and, to provide facilities for storage of critically needed supplies.
3. Administer the County Purchasing Card Program.
4. Administer the Property Control Program.
5. Amend Purchasing Policy

- D. Upon the prior approval of the County Administrator or designee, the Purchasing Director may delegate authority vested in the Purchasing Director to subordinate purchasing employees or other county staff when deemed necessary by the Purchasing Director, provided such staff shall comply with all applicable laws, rules and procedures established by the county to designee(s) as allowed by law or rule.
- E. The Purchasing Director shall coordinate with the Tallahassee-Leon County Office of Economic Vitality, Office of Minority, Women, and Small Business Enterprise, to implement, monitor, and enforce the Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy.

Section 65 PURCHASING CATEGORIES; THRESHOLD AMOUNTS

Table 1 Purchasing Process Thresholds	
Procurement Method	Threshold
Petty Cash/Reimbursement (Section 5.02)	Not to exceed \$100
Small Purchase Procedures (Section 65.013) Tangible Property/Controlled Asset Consumables Warehouse Operations (Section 5.0316.01.1)	\$1 to \$1,000 \$1 to \$23,500 \$1 to \$57,000
Blanket Purchase Orders (Section 5.04) Non-contractual Basis Contractual Basis	not to exceed \$5,000 not to exceed annual contract value
Field Quotes (Section 5.05) Tangible Property/Controlled Asset Consumables	\$1,000 to \$5,000 \$2,500 to \$5,000
Purchasing Quotes (Section 5.066.02)	\$5,000.01 to \$50,000
Bid - Informal Bid Process – Standard (Section 5.076.03)	\$50,000.01 to \$100,000
Bid – Informal Bid Process for Small Business Enterprise Program (Section 6.03.1)	\$50,000.01 to \$300,000
Bid – Informal Bid Process for Tenant Renovations/Improvements to County Space Leased by Private Entities (Section 5.07.16.03.2)	\$50,000.01 to \$200,000
Bid – Competitive Sealed Bids Solicitations (Section 5.086.08)	\$100,000.01 and above
Blanket Purchase Orders (Section 6.07) Non-contractual Basis Contractual Basis	not to exceed \$10,000 not to exceed annual contract value
RFP – Competitive Sealed Proposals (Sections 5.09 and 5.09.1)	Purchasing Director – Authorized to Release RFPs Expected to Result in Costs No Greater than \$100,000; County Administrator – Authorized to release all RFPs

Table 2 Contract Award and Signature Authority Thresholds	
Individual	Threshold ¹
Purchasing Director	*Procurement Agreements up to \$1250,000
County Administrator	*Procurement Agreements greater than \$100,000 and no greater than up to \$250,000 and employee benefits Agreements.**
Board of County Commissioners	*Procurement Agreements greater than \$250,000
<p><i>*All contracts will be in a form approved by the County Attorney's Office prior to execution. Term contracts will be awarded based upon the value of the initial term of the contract.</i></p> <p><i>**Signature Authority shall be limited to new benefits programs provided at no cost to the County and the execution of employee benefits agreements with existing providers, subject to available funding authorized by the Board.</i></p>	

Section 5.01 — UTILIZATION OF MINORITY, WOMEN, AND SMALL BUSINESS ENTERPRISES

~~Leon County procurement activities will be conducted in compliance with the Tallahassee – Leon County – Blueprint~~

Purchasing Policy

~~Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy as adopted by the Leon County Board of County Commissioners on February 25, 2020. Employees are encouraged to seek out and utilize certified minority, women owned, and small business enterprises in the procurement process, when available.~~

~~Whenever practicable, at least one of the three quotes/bids from certified minority, women, and small business enterprises shall be secured for Small Purchases, Field Quotes, Purchasing Quotes, and Informal Bids. The Purchasing Director or designee shall review the quotations and make the award or require additional quotations/bids prior to award.~~

Section 5.02 — PETTY CASH/REIMBURSEMENT

- ~~A. — Petty cash funds shall be established and administered under the financial policies of the Board.~~
- ~~B. — Purchases from any petty cash fund or the reimbursement for a purchase shall be governed by the following requirements:~~
- ~~1. — No purchase of any single item from any petty cash fund or for reimbursement shall exceed the authorized dollar limit for petty cash/reimbursements in Section 5.~~
 - ~~2. — Reimbursement for employee travel expenses from a petty cash fund shall not be allowed, except for local parking or toll costs.~~
 - ~~3. — Funds contained within a petty cash fund shall not be expended for the payment of salaries.~~
 - ~~4. — Expenditures from a petty cash fund or personal funds shall be reimbursed, provided:~~
 - ~~a) — They are supported by itemized vouchers, invoices, or receipts signed by the division or department head or designee.~~
 - ~~b) — They qualify as a proper public purpose.~~
 - ~~c) — They are expenses included within the approved annual budget of the division or department.~~

Section 65.013 SMALL PURCHASES

The purchase of commodities, equipment, and services, which cost less than the threshold authorized in Section 65, does not require solicitation of quotes or bids. Small purchases shall be authorized by Department or Division heads or their designees. Small purchase thresholds are to be determined utilizing the definitions below. Specific questions should be referred to the Purchasing Division for final decisions as to the determination of the category to be utilized. Small Purchases should be procured using a Purchasing Card (P-Card) if the purchase is allowable under Leon County Purchasing Card Policy No. 00-07.

- A. Tangible Property/Controlled Asset - Items/Assets that require a property tag and inclusion on the County inventory. ALL Tangible Property must be procured via a purchase order pursuant to the Tangible Personal Property Policy No. 02-5. For purposes of this section tangible property/controlled asset includes the following:
1. An item which has an original acquisition cost of \$1,000 or more; is not consumed in use and has a useful life of one year or more after initial acquisition; is not fixed in place and not an integral part of a structure or facility; and is not an integral part or component of another piece of equipment; and
 2. An item with a historical cost less than \$1,000 but has been identified as being particularly at risk or vulnerable to loss or theft and having a residual value when approaching its end of shelf life by the Purchasing Director and the appropriate Division Director. Examples include computers, laptops, iPads, certain types of IT equipment, and certain types of maintenance equipment.
- B. Consumables – Commodities and services that are not included in the Tangible Property/Controlled Asset description above. These items are generally assumed to be consumed during use, have little to no residual value when wear-out is achieved/reached, intended to be used up and then replaced, or used up very quickly. Some examples include writing instruments, fuel, filters, most items of clothing, paper products, food, and some replaceable hand tools such as shovels, rakes, etc.

Section 65.013.1 WAREHOUSE OPERATIONS

The purchase of commodities, materials, and equipment for warehouse inventory, which cost less than the threshold authorized in Section 65, does not require solicitation of quotes or bids. Use of economic indices, review of costs, market trends, and/or use of periodic quotations shall be used by staff to assure cost effective purchases.

Section 65.024 **BLANKET PURCHASE
ORDERS**

Blanket Purchase Orders of either type listed below shall not be used to purchase any tangible personal property item. Tangible personal property items shall be listed as individual line items on a purchase order.

- A. Non-contractual Basis - All purchases made with a non-contractual blanket purchase order shall follow the thresholds and requirements for competitive selection. No purchase order shall be issued for an amount greater than the limit established for a non-contractual blanket purchase order in Section 56 of this policy for the purchase of goods or services not under a contractual arrangement authorized under this purchasing policy or approved by the Board.
- B. Contractual Basis - No purchase order shall be issued for an amount greater than the limit established for a contractual blanket purchase order in Section 65 of this policy for the purchase of goods or services unless approved by the Board.

~~Section 5.05 — FIELD QUOTES~~

~~The purchase of goods and services, which cost within the range authorized for field quotes in Section 5, shall require competitive quotations from three or more vendors. The quotations may be obtained by the Department/Divisions.~~

Section 65.036 **PURCHASING
QUOTES**

The purchase of goods and services, which cost within the range authorized for purchasing quotes in Section

65, shall require competitive quotations from three or more vendors. The quotations may be obtained by the operating department/division or the Purchasing Division and shall be reviewed by the Purchasing Director, or

designee. Quotes

must be on company letterhead, quote forms, or in a similar format with a date and signature of an authorized representative of the vendor. ~~Quotes obtained for PCard purchases must be attached to the PCard reconciliation.~~

Section 65.047 **INFORMAL
BIDS**

For purchases within the cost range authorized for informal bids in Section 65, the Purchasing Director or designee shall ~~secure, whenever possible request,~~ a minimum of three ~~written quotations~~ sealed bids, which shall be the result of written specifications transmitted ~~by mail, by electronic format, or by facsimile~~ via normal Invitation to Bid procedures. ~~Informal Bids do not require public advertising or public access. When such quotations are received by facsimile, the purchasing agent will immediately seal and label the quotations until the time set for opening bids. In those instances where the securing of three quotations is not practicable, the Purchasing Director or designee shall provide written justification of such. The quotations bids shall be opened at a predetermined time and date. Responsive bids shall be reviewed, and a written recommendation of award shall be prepared for review and action.~~

Section 6.04.1 INFORMAL BIDS FOR SMALL BUSINESS ENTERPRISE PROGRAM RESERVED PROJECTS

Where feasible, the County may reserve projects within the cost range authorized for informal bids for small business enterprises in Section 6. All procedures in Section 6.04 shall be followed.

Section 65.047.24 **INFORMAL BIDS FOR TENANT RENOVATIONS AND IMPROVEMENTS FOR LEASED
SPACE**

For purchases for tenant renovations/improvements for County-owned spaces leased to private entities and within the cost range authorized for informal bids for lease space in Section 65, all procedures in Section 65.047 shall be followed.

Section 6.05 SINGLE AND SOLE SOURCE PURCHASES

- A. Single/Sole Source Certification. A contract may be awarded, except as otherwise provided for under state law, for a supply, service, material, equipment or construction item(s) without competition when the Purchasing Director, with the concurrence of the County Administrator or designee, certifies in writing, after conducting a good faith review of available sources, that there is only one available source for the required material, supply, service, equipment, or construction item(s). Awards exceeding the Signatory Authority Threshold established for the Purchasing Director in Section 6 shall require the concurrence of the County Administrator or designee. Such awards will be made within the authorized procurement limits identified in Section 65.0. When a purchase exceeds the threshold amount for Board/County Administrator approval, the item will be placed on the agenda for Board approval and certification that the vendor has been determined to be a single or sole source.
- B. Additional Purchases from Certified Single/Sole Source. The Purchasing Director shall be authorized, after initial single/sole source certification, to make additional purchases from a sole source vendor for a minimum maximum of one three years or until such time as contrary evidence is presented regarding sole source eligibility.

Section 6.06 EMERGENCY PURCHASES

- A. Authorization During Normal Business Hours. In the case of emergencies that require the immediate purchase of goods, equipment or services, the County Administrator, Purchasing Director, Group Director, or his designee shall be empowered to secure such goods or services without competitive bidding. In this event, all measures reasonably possible under the circumstances shall be taken to assure the maximum cost benefit to the County of the goods or services procured.
- B. Authorization Outside of Normal Business Hours. A department or division head, during non-business hours, is authorized to make purchases without competitive bids, when an emergency arises.
- C. Documentation and Approval. Documentation for emergency purchases pertaining to Section 6.06 (A) and (B) shall be submitted to the Purchasing Office on the standard requisition form with a detailed explanation, and support material attached, if applicable, within 10 workdays after the event occurred. Emergency purchases that exceed the competitive sealed bid threshold shall be ratified by the Board. Emergency purchases within the informal bid thresholds shall be approved by the County Administrator after-the-fact.
- D. Mutual Aid Agreements. The County may enter into and utilize Mutual Aid Agreements as provided in Chapter 252, Florida Statutes in the event of emergency situations. The Purchasing Director shall be authorized to invoke the terms of the Mutual Aid Agreement.

SECTION 6.07 COOPERATIVE PURCHASING

The County may take advantage of cooperative purchasing agreements identified below when it is in the best interest of the County as determined by the award thresholds in Section 6. Whenever practicable, vendors will be encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the contracting process, when available. (Please see Tallahassee – Leon County – Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy).

- A. State Contracts. The County is authorized to purchase goods or services from authorized vendors listed on the respective state contracts (state term continuing supply contracts, SNAPS agreements [State Negotiated Agreement Price Schedules], agreements resulting from Invitations to Negotiate [ITN], or other such contracts authorized by statute for use by local governments) of the Florida Department of Management Services or other state agencies. Such purchases shall be made without competitive bids provided that funding has been

appropriated and approved by the Board of County Commissioners in Department/Division accounts.

- B. Federal Supply Service. The County is authorized to purchase goods or services from authorized vendors listed on the eligible Federal Supply Schedules issued by the Federal General Services Administration. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.
- C. Collaborative Purchases with Other Public Procurement Units. The Purchasing Director, or designee shall have the authority to join with other units of government in cooperative purchasing ventures when the best interest of the County would be served thereby, and the same is in accordance with the County and State law. The Purchasing Director, or designee shall appropriately document such cooperative purchasing arrangements. All Cooperative Purchasing conducted under this section shall be through contracts awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.
- D. Other Governmental Entity Contracts ("Piggybacks"). The County is authorized to purchase goods or services from authorized vendors listed on eligible contracts of other governmental entities. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.
- E. Cooperative Purchasing Organizations. The County authorized to purchase goods or services from authorized vendors listed on eligible contracts of cooperative purchasing organizations. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy.

**Section 65.088 —COMPETITIVE SEALED
BIDDINGPROCUREMENTS**

- A. A. Conditions for Use. All contracts for purchases of a single item or aggregate for the proposed term of service in excess of the established base amount for competitive sealed bidding in Section 5 shall be awarded on the basis of sealed competitive bidding, except as provided in Section 5.09, Competitive Sealed Proposals. General Conditions for all Competitive Procurements.
 - 1. All competitive procurements are to be prepared by the Purchasing Division in conjunction with issuing department, who will provide input on the scope of the commodities, equipment or services needed, the legal ads, dates, vendor lists and other pertinent information as may be required by the Purchasing Division.
 - 2. Prohibited Communications

Any form of communication, except for written correspondence with the Purchasing Division requesting clarification or asking questions, shall be prohibited regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between:

 - a4. Any person or person's representative seeking an award from such competitive solicitation; and
 - b2. Any County Commissioner or Commissioner's staff, or any county employee authorized to act on

behalf of the Commission to award a particular contract.

For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.

The prohibited communication shall be in effect as of the release of the competitive solicitation and terminate at the time the Board, or a County department authorized to act on behalf of the Board, awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.

The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, contract negotiations during any public meetings, presentations made to the Board, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between any employee and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and any employee, communications with the County Attorney or communications with the Purchasing Director.

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Prohibited communications may result in disqualification from the particular request for proposal, request for qualification, bid, or any other competitive solicitation and shall be grounds for suspension from doing business with the County.

3. Human Trafficking language shall be incorporated into the Invitation to Bid requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.

4. Public Notice.

a. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$200,000 shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least 21 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$500,000 shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least once 30 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. Bids or proposals shall be received and opened at the location, date, and time established in the bid or proposal advertisement. In cases of emergency, the procedures required in this section may be altered by the County in any manner that is reasonable under the emergency circumstances.

The solicitation of competitive bids for work on roads shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, at least once each week for two consecutive weeks.

b. Changes to Public Notice. If the location, date, or time of the bid opening changes, written notice of the change shall be given in the form of an addendum, as soon as practicable after the change is made and posted on the Purchasing website.

c. Each invitation to bid, request for proposals, request for qualifications, or other procurement solicitation which is anticipated to include travel expenses by authorized persons as defined in the Leon County Travel Policy shall include the following notice:

"Consultant travel which is not covered within the scope of the consultant's contract, and which is billed separately to the County on a cost reimbursement basis must receive prior approval and will be reimbursed in accordance with the Leon County Travel Policy. Travel expenses shall be limited to those expenses necessarily incurred in the performance of a public purpose authorized by law to be performed by the Leon County Government and must be within limitations described herein and in Ch. 112.06, Florida Statutes. Consultants and contractors, traveling on a cost reimbursement basis, must

have their travel authorized by the department head from whose budget the travel expenses will be paid and the County Administrator."

5. Bid Opening. Bids shall be opened publicly. At least one representative from the Division of Purchasing shall open the bids in the presence of one or more witnesses at the time and place designated in the Invitation to Bid. The amount of each bid, and such other relevant information as may be deemed appropriate by the Purchasing Director, together with the name of each bidder, and all witnesses shall be recorded. The record (Tabulation Sheet) and each bid shall be open to public inspection as provided by law.
 6. Bid Acceptance and Evaluation. Bids shall be unconditionally accepted without alteration or correction, except as authorized in this Policy. Bids shall be evaluated based on the requirements set forth in the Invitation to Bid, which may include, but not be limited to criteria to determine acceptability such as: inspection, testing, quality, recycled or degradable materials content, workmanship, delivery, and suitability for a particular purpose and/or factors to determine a bidder's level of responsibility such as references, work history, bonding capacity, licensure, certifications, etc. Those criteria that will affect the bid price and that are to be considered in evaluation for award shall be objectively measured, such as discounts, transportation costs, and total or life cycle costs. No criteria may be used in bid evaluation that is not set forth in the Invitation to Bid, in regulations, or in this policy.
 7. Bid Agenda Item/Award Memo. The Tabulation Sheet and other solicitation documents, as necessary, shall be presented to the appropriate department or division head for review and recommendation. The department or division head shall prepare the recommendation in the appropriate format to the awarding authority as prescribed in Section 6.
 8. Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids, before or after award, or cancellation of awards or contracts based on such bid mistakes, shall be permitted where appropriate under the sole discretion of the County. Mistakes discovered before bid opening may be modified or withdrawn prior to the time set for bid opening. After bid opening, corrections in bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence that a mistake of a non-judgmental character was made, the nature of the mistake, and the bid price actually intended. After bid opening, no changes in bid price or other provisions of bids prejudicial to the interest of the County or fair competition shall be permitted. In lieu of bid correction, a low bidder alleging a material mistake of fact may be permitted to withdraw its bid if:
 - a. the mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident; or
 - b. the bidder submits evidence that clearly and convincingly demonstrates that a mistake was made. All decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes, shall be supported by a written determination made by the Purchasing Director and concurred with by the County Administrator.
- ~~Multi-Step Sealed Bidding. When it is considered impractical to initially prepare a purchase description to support an award based on price, an invitation for bids or request for proposals may be issued requesting the submission of unpriced offers to be followed by an invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation. A multi-step process utilizing pre-qualification of bidders or respondents may be used to ensure that the bidders/respondents have the appropriate licensure, capacity, qualifications, experience, staffing, equipment, bonding, insurance and similar project-based criteria to successfully perform a specific project or service. Those bidders/respondents determined qualified in the pre-qualification will then be eligible to participate in the invitation to bid~~

~~or request for proposal process for the project or service. The Purchasing Director shall develop and administer operational procedures governing any such pre-qualification process.~~

9. Cancellation of Solicitations. Any solicitation may be canceled, or any or all responses may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director in consultation with the County Administrator or designee. Notice of cancellation shall be provided to all plan-holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.

10. Disqualification of Vendors. For any specific bid, vendors may be disqualified by the Purchasing Director, or designee for the following reasons:

a. 1.—Failure to materially perform according to contract provisions on prior contracts with the County.

b. 2.—Conviction in a court of law of any criminal offense in connection with the conduct of business.

c. 3.—Clear and convincing evidence of a violation of any federal or state anti-trust law based on the submission of bids or proposals, or the awarding of contracts.

d. 4.—Clear and convincing evidence that the vendor has attempted to give a Board employee a gratuity of any kind for the purpose of influencing a recommendation or decision in connection with any part of the Board's purchasing activity.

e. Failure to execute a Public Entity Crimes Statement as required by Florida Statutes Chapter 287.133(3)(a).

5.—Failure to execute a Public Entity Crimes Statement as required by Florida Statutes Chapter 287.133(3)(a).

f. 6.—Other reasons deemed appropriate by the Board of County Commissioners.

11. Negotiation of Terms and Conditions – Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, or all bids received exceed the available budget identified for the commodity or contractual service, the Purchasing Director or designee may negotiate on the best terms and conditions. The Purchasing Director or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations. Award will be made according to the award thresholds in Section 65.

12. Local Preference.

a. In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures in which pricing is the major consideration, if applicable, the County may give a preference to Local Businesses in making such purchase or awarding such contract, as follows:

i. Individuals or firms which have their home office located within Leon, Gadsden, Wakulla,

or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent of the bid price.

- ii. Individuals or firms which do not have their home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent of the bid price.
- iii. The maximum cost differential shall not exceed \$20,000.00. Total bid price shall include the base bid and all alternatives or options to the base bids, which are part of the bid and being recommended for award by the appropriate authority.

—Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division.

b. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a “Local Business.”

c. Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator or designee.

(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)

13. Notice of Intended Decision. The Intended Decision shall be posted on the County procurement website and on the public notice board in the Purchasing Division. This written notice shall state the firm or firms to whom the County intends to award the contract resulting from the solicitation and establishes the 72 consecutive hour period in which a notice of intent to protest may be timely filed.

4. Notice of Right to Protest. Any competitive bid award recommendation may be protested if the recommendation is alleged to be contrary to the County’s rules or policies, the solicitation specifications, or, or law. The standard of proof for such proceedings shall be whether the action is clearly erroneous, contrary to competition, arbitrary or capricious. Such notice of intent of bid protest shall be delivered to the Purchasing Director within 72 consecutive hours after posting of the Notice of Intended Decision of Award (excluding Saturdays, Sundays, and County holidays). Protestor shall file thereafter a formal written bid challenge within 40-five (5) business calendar days after the date in which the notice of intent of bid protest has been submitted. Any vendor who is deemed non-responsive to the competitive procurement does not have standing to file a protest. Furthermore, vendors who would not be awarded the subject contract, even if the protest were successful, lack standing. Failure to timely file a notice of intent of bid protest or failure to timely file a formal written bid protest with the proper bond shall constitute a waiver of all rights provided under the Leon County Purchasing Policy.

14.

Section 6.08.1 INVITATION TO BID.

The invitation to bid should be utilized when the County is capable of establishing precise

specifications for a commodity or defining, with specificity, a scope of services for the commodities or contractual services sought. Through this process, vendors are able to compete on a cost basis for like items or services. The selection will be based upon the lowest priced, responsive, and responsible bidder.

An invitation to bid shall be issued and shall include specifications, all contractual terms and conditions, and the place, date, and time for opening or submittal. All interpretations or corrections shall be issued as addenda. The County shall not be responsible for oral clarifications or representations.

1. Alternate(s). Alternate bids will not be considered unless authorized by and defined in the invitation to bid or addenda thereto.
- ~~2. Approved Equivalents. The County reserves the right to determine acceptance of item(s) as an approved equivalent. Bids, which do not comply with, stated requirements for equivalents in the bid conditions are subject to rejection. The procedure for acceptance of equivalents shall be included in the invitation to bid or addenda thereto.~~
2. Award. The contract shall be awarded with reasonable promptness to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the invitation to bid. The County reserves the right to waive any minor irregularity in bids and to make an award in whole or in part when either or both conditions are in the best interest of Leon County. The contract shall be awarded by purchase order or other written notice. Every procurement of contractual services shall be evidenced by a written agreement.
3. Multi-Step Sealed Bidding. When it is considered impractical to initially prepare a purchase description to support an award based on price, an invitation for bids may be issued requesting the submission of unpriced offers to be followed by an invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation.

A multi-step process utilizing pre-qualification of bidders may be used to ensure that the bidders have the appropriate licensure, capacity, qualifications, experience, staffing, equipment, bonding, insurance and similar project-based criteria to successfully perform a specific project or service. Those bidders determined qualified in the pre-qualification will then be eligible to participate in the invitation to bid process for the project or service. The Purchasing Director shall develop and administer operational procedures governing any such pre-qualification process.

6.08.2 Section

- ~~3. Human Trafficking language shall be incorporated into the Invitation to Bid requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.~~

C. Public Notice.

- ~~1. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$200,000 shall be publicly advertised at least once in a newspaper of general circulation in the County at least 21 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. The solicitation of competitive bids or proposals for any County construction project that is projected to cost more than \$500,000 shall be publicly advertised at least once in a newspaper of general circulation in the County at least 30 days prior to the established bid opening and at least 5 days prior to any scheduled pre-bid conference. Bids or proposals shall be received and opened at the location, date, and time established in the bid or proposal advertisement. In cases of emergency, the procedures required in this section may be altered by the County in any manner that is reasonable under the emergency circumstances.~~

~~The solicitation of competitive bids for work on roads shall be publicly advertised in a newspaper of general circulation in the county at least once each week for two consecutive weeks.~~

- ~~2. Changes to Public Notice. If the location, date, or time of the bid opening changes, written notice of the change shall be given in the form of an addendum, as soon as practicable after the change is made and posted on the Purchasing Division website.~~
- ~~3. Each invitation to bid, request for proposals, request for qualifications, invitation to negotiate, or other procurement solicitation which is anticipated to include travel expenses by authorized persons as defined in the Leon County Travel Policy shall include the following notice:~~

~~"Consultant travel which is not covered within the scope of the consultant's contract and which is billed~~

~~separately to the County on a cost reimbursement basis must receive prior approval and will be reimbursed in accordance with the Leon County Travel Policy. Travel expenses shall be limited to those expenses necessarily incurred in the performance of a public purpose authorized by law to be performed by the Leon County Government and must be within limitations described herein and in Ch. 112.06, Florida Statutes. Consultants and contractors, traveling on a cost reimbursement basis, must have their travel authorized by the department head from whose budget the travel expenses will be paid and the County Administrator."~~

~~D. Bid Opening. Bids shall be opened publicly. At least one representative from the Division of Purchasing shall open the bids in the presence of one or more witnesses at the time and place designated in the Invitation to Bid. The amount of each bid, and such other relevant information as may be deemed appropriate by the Purchasing Director, together with the name of each bidder, and all witnesses shall be recorded. The record (Tabulation Sheet) and each bid shall be open to public inspection as provided by law.~~

~~E. — Bid Acceptance and Evaluation. Bids shall be unconditionally accepted without alteration or correction, except as authorized in this Policy. Bids shall be evaluated based on the requirements set forth in the Invitation to Bid, which may include, but not be limited to criteria to determine acceptability such as: inspection, testing, quality, recycled or degradable materials content, workmanship, delivery, and suitability for a particular purpose and/or factors to determine a bidder's level of responsibility such as references, work history, bonding capacity, licensure, certifications, etc. Those criteria that will affect the bid price and that are to be considered in evaluation for award shall be objectively measured, such as discounts, transportation costs, and total or life cycle costs. No criteria may be used in bid evaluation that is not set forth in the Invitation to Bid, in regulations, or in this policy.~~

~~F. — Bid Agenda Item/Award Memo. The Tabulation Sheet and other bid documents, as necessary, shall be presented to the appropriate department or division head for review and recommendation. The department or division head shall prepare the recommendation in the appropriate format to the awarding authority as prescribed in Section 5.~~

~~G. — Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids, before or after award, or cancellation of awards or contracts based on such bid mistakes, shall be permitted where appropriate under the sole discretion of the County. Mistakes discovered before bid opening may be modified or withdrawn upon written notice received in the office designated in the Invitation for Bids prior to the time set for bid opening. After bid opening, corrections in bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence that a mistake of a non-judgmental character was made, the nature of the mistake, and the bid price actually intended. After bid opening, no changes in bid price or other provisions of bids prejudicial to the interest of the County or fair competition shall be permitted. In lieu of bid correction, a low bidder alleging a material mistake of fact may be permitted to withdraw its bid if:~~

- ~~1. — the mistake is clearly evident on the face of the bid document, but the intended correct bid is not similarly evident; or~~
- ~~2. — the bidder submits evidence that clearly and convincingly demonstrates that a mistake was made. All decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes, shall be supported by a written determination made by the Purchasing Director and concurred with by the County Administrator.~~

~~H. — Multi-Step Sealed Bidding.~~

- ~~1. — When it is considered impractical to initially prepare a purchase description to support an award based on price, an invitation for bids or request for proposals may be issued requesting the submission of unpriced offers to be followed by an invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation.~~

~~C. — 2. A multi-step process utilizing pre-qualification of bidders or respondents may be used to ensure that the bidders/respondents have the appropriate licensure, capacity, qualifications, experience, staffing, equipment, bonding, insurance and similar project based criteria to successfully perform a specific project or service. Those bidders/respondents determined qualified in the pre-qualification will then be eligible to participate in the invitation to bid or request for proposal process for the project or service. The Purchasing Director shall develop and administer operational procedures governing any such pre-qualification process.~~

~~D. —~~

~~I. — Award. The contract shall be awarded with reasonable promptness to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the invitation to bid. The County reserves the right to waive any minor irregularity in bids and to make an award in whole or in part when either or both conditions are in the best interest of Leon County. The contract shall be awarded by purchase order or other written notice. Every procurement of contractual services shall~~

~~be evidenced by a written agreement.~~

~~1. _____~~

~~2. _____~~

~~J. Cancellation of Invitations for Bids. — An invitation for bids or other solicitation may be canceled, or any or all bids may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director or designee, in concurrence with the County Administrator or designee. Notice of cancellation shall be provided to all plan holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.~~

~~K. Disqualification of Vendors. — For any specific bid, vendors may be disqualified by the Purchasing Director, or designee for the following reasons:~~

~~1. Failure to materially perform according to contract provisions on prior contracts with the County.~~

~~2. Conviction in a court of law of any criminal offense in connection with the conduct of business.~~

~~3. Clear and convincing evidence of a violation of any federal or state anti-trust law based on the submission of bids or proposals, or the awarding of contracts.~~

~~4. Clear and convincing evidence that the vendor has attempted to give a Board employee a gratuity of any kind for the purpose of influencing a recommendation or decision in connection with any part of the Board's purchasing activity.~~

~~5. Failure to execute a Public Entity Crimes Statement as required by Florida Statutes Chapter 287.133(3)(a).~~

~~6. Other reasons deemed appropriate by the Board of County Commissioners.~~

~~L. Negotiation of Terms and Conditions — Less Than Two Responsive Submissions. — If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, or all bids received exceed the available budget identified for the commodity or contractual service, the Purchasing Director or designee may negotiate on the best terms and conditions. The Purchasing Director or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations. Award will be made according to the award thresholds in Section 5.~~

~~M. Local preference in bidding.~~

~~1. In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual~~

~~services, and construction of improvements to real property or existing structures in which pricing is the major consideration, the County may give a preference to Local Businesses in making such purchase or awarding such contract, as follows:~~

- ~~a) Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent of the bid price.~~
 - ~~b) Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent of the bid price.~~
 - ~~c) The maximum cost differential shall not exceed \$20,000.00. Total bid price shall include the base bid and all alternatives or options to the base bids, which are part of the bid and being recommended for award by the appropriate authority.~~
- ~~2. Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a "Local Business."~~
- ~~3. Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator or designee.~~

~~(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)~~

~~N. Prohibited Communications~~

~~Any form of communication, except for written correspondence with the Purchasing Division requesting clarification or asking questions, shall be prohibited regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between:~~

- ~~1. Any person or person's representative seeking an award from such competitive solicitation; and~~
- ~~2. Any County Commissioner or Commissioner's staff, or any county employee authorized to act on behalf of the Commission to award a particular contract.~~

~~For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.~~

~~The prohibited communication shall be in effect as of the release of the competitive solicitation and terminate at the time the Board, or a County department authorized to act on behalf of the Board, awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.~~

~~The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, contract negotiations during any public meetings, presentations made to the Board, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between any employee and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and any employee, communications with the County Attorney or communications with the Purchasing Director.~~

~~Prohibited communications may result in disqualification from the particular request for proposal, request for qualification, bid, or any other competitive solicitation and shall be grounds for suspension from doing business with the County.~~

Section 5.09 — COMPETITIVE SEALED PROPOSALS

Section ~~65.089.12~~ — REQUEST FOR QUALIFICATIONS PROPOSALS

Requests for proposals are used when the scope of work, specifications, or contractual terms and conditions cannot be well defined. Evaluation of a response is based on prior established criteria which involves more than price. A request for proposals includes, but is not limited to, applicable laws and rules, functional or general specifications, statement of work, proposal instructions, and evaluation criteria.

- A. Conditions for Use. When the Director of Purchasing determines that the use of an Invitation to Bid is either not practical or not advantageous to the County, a contract may be entered into by the use of competitive sealed proposals.
- B. Consultant's Competitive Negotiation Act. Professional services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined under the Consultant's Competitive Negotiation Act (Section 287.055, Florida Statutes), shall be secured under the provisions of Section 6.08.3.
- C. Public Notice. Adequate public notice of the Request for Proposals shall be given in the same manner as provided in Section 6.08 (A)(4) of this policy for competitive procurements.
- D. Evaluation Factors. The Request for Proposals shall state the relative importance of objective criteria outlined in the scope of services, fee proposal, and other evaluation criteria.
- E. Proposal Cancellation or Postponement. The Director of Purchasing or designee may, prior to a proposal opening, elect to cancel or postpone the date and/or time for proposal opening or submission.
- F. Revisions and Discussions with Responsible Offerors. Discussions may be conducted with responsible offerors who submit proposals determined to be qualified of being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining the best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing offerors.
- G. Award. Award shall be made to the responsive, responsible offeror whose proposal is determined in writing to be the most advantageous to Leon County, taking into consideration the evaluation factors set forth in the Request for Proposals. No other factors or criteria shall be used in the evaluation criteria that are not included in the Request for Proposal. The County reserves the right to waive any minor irregularity in proposals and to make an award in whole or in part when either or both conditions are in the best interest of Leon County

Section 6.08.3 REQUEST FOR PROPOSALS FOR PROFESSIONAL ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL, AND LAND SURVEYING SERVICES

- A. A. — Purpose. The purpose of this section, and the procedures established hereunder, is to ensure compliance with Section 287.055 Florida Statutes, known as the Consultants Competitive Negotiation Act (CCNA). This act establishes parameters within which the County must select professional services from architects, engineers, landscape architects, surveyors, and mappers. The CCNA requires the County to select these services on a qualitative basis using prescribed criteria prior to any negotiations, which may consider the cost of such services.

- B. Public Announcement. It is the policy of the County to publicly announce all requirements for professional architectural, engineering, landscape architectural, land surveying, and mapping services, and to negotiate such contracts on the basis of demonstrated competence and qualifications at fair and reasonable prices. In the procurement of such services, the Purchasing Director may require firms to submit a statement of qualifications, performance data, and other information related to the performance of professional services.
1. Scope of Project Requirements.
 - a) For specific projects, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) the objectives of the study or service;
 - 3) estimated period of time needed for the service or the study;
 - 4) the estimated cost of the service or study;
 - 5) whether the proposed study or service would or would not duplicate any prior or existing study or service; and
 - 6) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.
 - b) For Continuing Supply Services, the County office requesting the professional services shall submit to the Purchasing Director written project requirements indicating the nature and scope of the professional services needed by the office, including but not limited to the following:
 - 1) the general purpose of the service or study;
 - 2) estimated period of time needed for the service or the study;
 - 3) the estimated cost of the service or study;
 - 4) the desired qualifications, listed in order of importance, applicable to the scope and nature of the services requested.
 2. Review of Project Requirements. The Purchasing Director or his/her designee shall review the scope of project requirements and prepare a draft request for proposals. The draft RFP shall be submitted to the requesting office for consideration and revision, as may be needed, prior to public distribution of the RFP.
 3. Distribution of RFP. The Purchasing Director shall distribute the RFP in accord with standard procedures including publication of legal notice and provide notification of the date and time when such proposals are due. Public notice shall be as provided in Section 65.08 (AG)(4).

~~4. Negotiation of Terms and Conditions — Less Than Two Responsive Submissions. If less than two responsive bids, proposals, or replies for commodity or contractual services purchases are received, the Purchasing Director, or designee may negotiate on the best terms and conditions. The Purchasing Director, or designee shall document the reasons that such action is in the best interest of the County in lieu of resoliciting competitive sealed bids, proposals, or replies. The Purchasing Director shall report all such actions to the County Administrator or designee prior to final award of any contract resulting from the negotiations.~~

45. Modification Prohibition. After the publicized submission time and date, any proposal received shall not be modified or allowed to be modified in any manner except for correction of clerical errors or other similar minor irregularities as may be allowed by the Purchasing Director or the Selection Committee (defined in Section ~~65.089.34~~(C) at any point in the process prior to contract negotiations.

56. Reuse of Existing Plans. There shall be no public notice requirements or utilization of the selection process

as provided in this section for projects in which the County is able to reuse existing plans from a prior project. However, public notice of any plans, which are intended to be reused at some future time, shall contain a statement that provides that the plans are subject to reuse.

~~7. Local preference in Requests for Proposals.~~

~~a) In the purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures for which a request for proposals is developed with evaluation criteria, a local preference of the total score may be assigned for a local preference, as follows:~~

~~1) Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of five percent.~~

~~2) Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a Local Business as defined herein, shall be given a preference in the amount of three percent.~~

~~b) Certification. Any vendor claiming to be a Local Business shall so certify in writing to the purchasing division. The certification shall provide all necessary information to meet the requirements for a Local Business as defined herein. The purchasing agent shall not be required to verify the accuracy of any such certifications and shall have the sole discretion to determine if a vendor meets the definition of a "Local Business."~~

~~e) Waiver. The application of local preference to a particular purchase, contract, or category of contracts for which the County is the awarding authority may be waived upon written recommendation of the County Administrator and approval of the Board. The application of local preference to a particular purchase, contract, or category of contracts below the award authority of the Board may be waived upon written recommendation of the Director of Purchasing and approval of the County Administrator.~~

~~(Reference Article IX, Section 2-400, Chapter 2 of the Code of Laws of Leon County, Florida)~~

~~8. Human Trafficking language shall be incorporated into the Request for Proposals requiring vendors to attest that they do not utilize human trafficked labor in compliance with Section 787.06, Florida Statutes.~~

69. Exemptions. This section shall not apply to a professional service contract for a project where the basic construction cost is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or for a planning or study activity when the fee for professional services is estimated by the agency to be less than the threshold amount provided in s. 287.055, Florida Statutes, or in cases of valid public emergency so certified by the County Administrator. This section shall not apply to any

requirement for professional services if a continuing contract is in effect and a determination is made to utilize the continuing contract to obtain such services.

C. CCNA Evaluation Committee Membership and Evaluation.

1. Depending on the expected complexity and expense of the professional services to be contracted, the County Administrator, or his/her designee shall determine whether a three member or five-member selection committee will best serve the needs of the County.
2. —Membership of all Evaluation Committees shall be appointed by the County Administrator or his/her designee.
3. Public Meetings. In accordance with Florida Statute 286.011, all Evaluation Committee meetings subsequent to the opening of the solicitation are to be public meetings. The Chairperson shall be responsible to provide the Purchasing Division with all meeting information (date, time, location, and reason for meeting) no less than 96 hours in advance of any scheduled meeting, excluding holidays and weekends. The Purchasing Division will provide reasonable notice of all meetings, no less than 72 hours in advance of such scheduled meeting, excluding holidays and weekends, by posting a Notice of Evaluation Committee Meeting on the public notice bulletin board in the Division offices and on the Leon County [procurement](#) website. The Purchasing Director shall develop and implement Evaluation Committee procedures to ensure compliance with public meeting requirements.
4. Contact with the CCNA Evaluation Committee. Members of the CCNA Evaluation Committee are prohibited from discussing a project with any professional or professional firm that may submit a proposal during the procurement process, except in formal committee meetings. The conduct of the business and discussions regarding the proposals before the CCNA Evaluation Committee must be done in the public meetings only.
5. Evaluation of Proposals. Only written responses of statements of qualifications, performance data, and other data received in the purchasing office by the publicized submission time and date shall be evaluated.
 - a) —The initial ranking of proposals is [determined by the average rank](#) based upon the points given [by each evaluator](#) in the Weighted Scoring Sheet utilizing the Evaluation Criteria Matrix. The scores will be provided by the Purchasing and MWSBE Divisions for Local preference and MWBE participation, respectively.
 - b) Shortlisting. The best-qualified respondents shall be based upon the CCNA Evaluation Committee's ability to differentiate qualifications applicable to the scope and nature of the services to be performed as indicated by the ratings on the Weighted Scoring Sheet. Typically, the top three rated firms, if there are at least three responsive respondents, will be considered as the shortlisted firms, unless the County Administrator or designee, after input and discussion with the CCNA Evaluation Committee, approves adding additional firms to the shortlist.
6. —Presentations/Interviews.—The CCNA Evaluation Committee may choose to conduct formal presentations/interviews with shortlisted firms prior to final ranking.
7. Final Ranking. The CCNA Evaluation Committee shall utilize the Ordinal Process Rating System to rank the firms. The respondents shall be listed in order of preference starting at the top of the list. The list of best-qualified persons shall be forwarded to the [Purchasing Director](#), County Administrator, or Board, as appropriate, for approval prior to beginning contract negotiations. Negotiation sequence shall be based on the order of preference.

D. Negotiation Staff. Contract negotiations shall be conducted by the Purchasing Director or designee ~~(s)~~ or by a Negotiation Committee.

1. Negotiation Committee Membership. Membership of the three-member Negotiation Committee shall

consist of:

- a) the Purchasing Director, or the designee of the Purchasing Director who shall chair the committee,
- b) the head of the primary using department or agency, or his/her designee,
- c) the County Attorney or designee.

2. Negotiation. The Negotiator(s) shall negotiate a contract with the firm considered to be the most qualified to provide the services at compensation and upon terms which the Negotiator(s) determines to be fair and reasonable to the County. In making this decision, the Negotiator(s) shall take into account the estimated value, the scope, the complexity, and the professional nature of the services to be rendered. Should the Negotiator(s) be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, negotiations with that firm shall be formally terminated. The Negotiator(s) shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the Negotiator(s) shall formally terminate negotiations, and shall then undertake negotiations with the third most qualified firm. Should the Negotiator(s) be unable to negotiate a satisfactory contract with any of the selected firms, the Selection Committee shall select additional firms in order of their competence and qualifications, and the Negotiator(s) shall continue negotiations in accordance with this ~~s~~Section until an agreement is reached or until a determination has been made not to contract for such services.
3. Continuing Contracts. Nothing in this section (~~5.09.16.08.3~~) shall be construed to prohibit continuing contracts for professional services between a firm and the County.

~~E. Cancellation of Solicitations. Any solicitation may be canceled, or any or all responses may be rejected in whole or in part when it is in the best interests of the County, as determined by the Purchasing Director in consultation with the County Administrator or designee. Notice of cancellation shall be provided to all plan holders and posted on the County website. The notice shall identify the solicitation, explain the reason for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re-solicitation or any future procurement of similar items.~~

~~Section 5.09.2 OTHER COMPETITIVE SEALED PROPOSALS~~

- ~~A. Conditions for Use. When the Director of Purchasing determines that the use of competitive sealed bidding an Invitation to Bid is either not practical or not advantageous to the County, a contract may be entered into by the use of competitive sealed proposals.~~
- ~~B. Consultant's Competitive Negotiation Act. Professional services within the scope of the practice of architecture, professional engineering, landscape architecture, or registered land surveying, as defined under the Consultant's Competitive Negotiation Act (Section 287.055, Florida Statutes), shall be secured under the provisions of Section 5.09.1.~~
- ~~C. Public Notice. Adequate public notice of the Request for Proposals shall be given in the same manner as provided in subsection 5.08C of this policy for competitive sealed bidding.~~
- ~~D. Evaluation Factors. The Request for Proposals shall state the relative importance of criteria outlined in the scope of services, fee proposal, and other evaluation criteria.~~
- ~~E. Proposal Cancellation or Postponement. The Director of Purchasing or designee may, prior to a proposal opening, elect to cancel or postpone the date and/or time for proposal opening or submission.~~
- ~~F. Revisions and Discussions with Responsible Offerors. Discussions may be conducted with responsible offerors who submit proposals determined to be qualified of being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining the best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing offerors.~~

~~G. Award. Award shall be made to the responsive, responsible offeror whose proposal is determined in writing to be the most advantageous to Leon County, taking into consideration the evaluation factors set forth in the Request for Proposals. No other factors or criteria shall be used in the evaluation criteria that are not included in the Request for Proposal. The County reserves the right to waive any minor irregularity in proposals and to make an award in whole or in part when either or both conditions are in the best interest of Leon County.~~

Section 6.08.4 INVITATION TO NEGOTIATE

The invitation to negotiate should be utilized when the scope of the project is not clearly defined and the County has determined that negotiations may be necessary to receive the best value. The invitation shall invite vendor input on the scope, schedule, and process for initiating the project. The ITN method of procurement is frequently used in areas experiencing constant change in the marketplace and the County desires the opportunity to obtain current up-to-date goods or services at the time of contracting.

A. Conditions for Use. When the Purchasing Division determines that the use of an Invitation to Bid (ITB) or Request for Proposal (RFP) is either not practical or not advantageous to the County, a contract may be entered into by the use of an Invitation to Negotiate (ITN). The invitation to negotiate is a solicitation which is intended to determine the best method for achieving a specific goal or solving a particular problem and identifies one or more responsive vendors with which the agency may negotiate in order to receive the best value. The invitation to negotiate should be utilized when the scope of the project is not clearly defined and the County has determined that negotiations may be necessary to receive the best value. The invitation shall invite vendor input on the scope, schedule, and process for initiating the project. The ITN method of procurement is frequently used in areas experiencing constant change in the marketplace and the County desires the opportunity to obtain current up-to-date goods or services at the time of contracting.

B. Criteria. The criteria that will be used for determining the acceptability of the reply and guiding the selection of the vendors with which the County will negotiate must be specified. The department director shall outline the general scope of services to be addressed by the proposers. The Purchasing Division, in conjunction with the department director, shall prepare the criteria and development of the invitation to negotiate which should include, but not be limited to, the following: Introduction, Background, Evaluation Criteria, Selection Process; Required Forms, and Proposed Contract.

C. Evaluation Committee. Depending on the expected complexity and expense of the commodity or service to be contracted, the County Administrator, or his/her designee shall determine whether a three member or five-member selection committee will best serve the needs of the County. Membership of all Evaluation Committees shall be appointed by the County Administrator or his/her designee. Members of the Evaluation Committee are prohibited from discussing a project with any firm that may submit a reply during the procurement process, except in formal committee meetings. The conduct of the business and discussions regarding the replies before the Evaluation Committee must be done in the public meetings only.

D. Evaluation of Replies. The ranking of replies is determined by the average rank based upon the points given by each evaluator in the Weighted Scoring Sheet utilizing the Evaluation Criteria Matrix. The Evaluation Committee shall evaluate replies against all evaluation criteria set forth in the invitation to negotiate in order to establish a competitive range of replies reasonably susceptible of award.

E. Negotiations. Contract negotiations shall be conducted by the Purchasing Director or designee. The County may select one or more vendors within the competitive range with which to commence negotiations. After negotiations are conducted, the County shall award the contract to the responsible and responsive vendor that the County determines will provide the best value to the [stateCounty](#), based on the selection criteria.

~~A. Single/Sole Source Certification. A contract may be awarded, except as otherwise provided for under state law, for a supply, service, material, equipment or construction item(s) without competition when the Purchasing Director, with the concurrence of the County Administrator or designee, certifies in writing, after conducting a good faith review of available sources, that there is only one available source for the required material, supply, service, equipment, or construction item(s). Such awards will be made within the authorized procurement limits identified in Section 5.0. When a purchase exceeds the threshold amount for Board approval, the item will be placed on the agenda for Board approval and certification that the vendor has been determined to be a single or sole source.~~

~~B. Additional Purchases from Certified Single/Sole Source. The Purchasing Director shall be authorized, after initial single/sole source certification, to make additional purchases from a sole source vendor for a minimum of one year or until such time as contrary evidence is presented regarding sole source eligibility.~~

Section 5.11 — EMERGENCY PURCHASES

~~A. Authorization During Normal Business Hours. In the case of emergencies that require the immediate purchase of goods, equipment or services, the County Administrator, Purchasing Director, Group Director, or his designee~~

~~shall be empowered to secure such goods or services without competitive bidding. In this event, all measures reasonably possible under the circumstances shall be taken to assure the maximum cost benefit to the County of the goods or services procured.~~

- ~~B. Authorization Outside of Normal Business Hours. A department or division head, during non-business hours, is authorized to make purchases without competitive bids, when an emergency arises.~~
- ~~C. Documentation and Approval. Documentation for emergency purchases pertaining to Section 5.11 (A) and (B) shall be submitted to the Purchasing Office on the standard requisition form with a detailed explanation, and support material attached, if applicable, within 10 workdays after the event occurred. Emergency purchases that exceed the competitive sealed bid threshold shall be ratified by the Board. Emergency purchases within the informal bid thresholds shall be approved by the County Administrator after the fact.~~
- ~~D. Mutual Aid Agreements. The County may enter into and utilize Mutual Aid Agreements as provided in Chapter 252, Florida Statutes in the event of emergency situations. The Purchasing Director shall be authorized to invoke the terms of the Mutual Aid Agreement.~~

Section 5.12 — COOPERATIVE PURCHASING

~~The County may take advantage of cooperative purchasing agreements identified below when it is in the best interest of the County as determined by the award thresholds in Section 5. Whenever practicable, vendors will be encouraged to seek out and utilize certified minority, women-owned, and small business enterprises in the contracting process, when available. (Please see Tallahassee Leon County Blueprint Intergovernmental Agency, Minority, Women, and Small Business Enterprise Policy).~~

- ~~A. State Contracts. The County is authorized to purchase goods or services from authorized vendors listed on the respective state contracts (state term continuing supply contracts, SNAPS agreements [State Negotiated Agreement Price Schedules], agreements resulting from Invitations to Negotiate [ITN], or other such contracts authorized by statute for use by local governments) of the Florida Department of Management Services or other state agencies. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.~~
- ~~B. Federal Supply Service. The County is authorized to purchase goods or services from authorized vendors listed on the eligible Federal Supply Schedules issued by the Federal General Services Administration. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts.~~
- ~~C. Collaborative Purchases with Other Public Procurement Units. The Purchasing Director, or designee shall have the authority to join with other units of government in cooperative purchasing ventures when the best interest of the County would be served thereby, and the same is in accordance with the County and State law. The Purchasing Director, or designee shall appropriately document such cooperative purchasing arrangements. All Cooperative Purchasing conducted under this section shall be through contracts awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.~~
- ~~D. Other Governmental Entity Contracts ("Piggybacks"). The County is authorized to purchase goods or services from authorized vendors listed on eligible contracts of other governmental entities. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy. Each selection method shall clearly state the intention to include participation by other units of government as a requirement for use in cooperative purchasing.~~

~~E. Cooperative Purchasing Organizations. The County authorized to purchase goods or services from authorized vendors listed on eligible contracts of cooperative purchasing organizations. Such purchases shall be made without competitive bids provided that funding has been appropriated and approved by the Board of County Commissioners in Department/Division accounts. All Cooperative Purchasing contracts utilized under this section shall have been awarded through full and open competition, including use of source selection methods equivalent to those required by this policy.~~

Section ~~5.436.09~~ BID PROTEST PROCEDURE ~~ING INTENDED DECISIONS AND PROCUREMENT AWARDS~~

A. ~~Right to Protest. Subject to the limitations of Section 6.08, 13, Any person, hereinafter referred to as Protestor, who submits a timely response to a solicitation invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, a multi-step sealed bid, or multi-step request for proposals under Sections 5.07, 5.08, 5.09, 5.09.1 or 5.09.26.08.1, 6.08.2, 6.08.3, or 6.08.4 of this Policy, and who is aggrieved with an Intended Decision of the County or a Procurement Award rendered by the Board of County Commissioners shall have the right to protest. Failure to protest an Intended Decision shall act as a bar to protest a subsequent Procurement Award that adopts the Intended Decision in all material respects.~~

1. Any Protestor wishing to protest an Intended Decision shall follow the procedures set forth in paragraphs B, C, and D of this Section.

~~2. Any Protestor wishing to protest a Procurement Award shall follow the procedures in paragraphs B, C, and E of this Section.~~

B. ~~Filing a Protest. A Protestor shall file with the County a notice of intent to protest in writing within seventy-two (72) consecutive hours (excluding Saturdays, Sundays, and County holidays) after the posting of the notice of Intended Decision or Procurement Award of the~~

~~County. A formal written protest shall be filed within 40 five (5) calendar business days after the date the notice of intent to protest has been filed. Failure to timely file a notice of intent to protest or failure to file a formal written protest including the required bond, shall constitute a waiver of the right to proceedings under this Section.~~

Any bidder/proposer who is deemed non-responsive to the solicitation does not have standing to file a protest. Furthermore, bidders/proposers who would not be awarded the subject contract, even if the protest were successful, lack standing.

A notice of intent to protest and the formal written protest are deemed filed with the County when it is received by the Purchasing Division.

1. ~~The notice of intent to protest shall contain at a minimum: the name of the Protestor; the Protestor's address and phone number; the name of the Protestor's representative to whom notices may be sent; the name and bid number of the solicitation; and, a brief factual summary of the basis of the protest.~~

2. The formal written protest shall: identify the Protestor and the solicitation involved; include a plain, clear statement of the grounds upon which the protest is based; refer to the statutes, laws, ordinances, or other legal authorities which the Protestor deems applicable to such grounds; and, specify the relief to which the Protestor deems him/herself entitled.

3. A formal written protest shall include the posting of a bond with the Purchasing Division at the time of filing the formal written protest, made payable to the Board of County Commissioners, Leon County, in an amount equal to ~~one-three~~ percent (~~13~~%) of the County's estimate of the total dollar amount of the contract or \$5000, whichever is greater. If after completion of the bid protest process and any court proceedings, the County prevails, the County shall be entitled to recover all court costs provided under Florida law, but in no event attorney fees, which shall be included in the final order of judgment rendered by the court. Upon payment of such court costs by the Protestor, the bond shall be returned to him/~~her~~. After completion of the bid protest process and any court proceedings, if the Protestor prevails, the protestor shall be entitled to have his bond returned and he shall be entitled to recover from the County all court costs provided under Florida law, but in no event attorney fees, lost profits or bid preparation costs, which shall be included in the final order of judgment rendered by the court. —In no case will the Protestor or Intervenor be entitled to any costs incurred with the solicitation, including bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.

4. Timeliness of protest determinations. —All determinations on the timeliness of notices of intent to protest and formal written protests will be made by the Purchasing Director or designee.

~~C. General Provisions~~

- ~~1. 1. Intervenor. Any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, and who has a substantial interest in the Intended Decision or Procurement Award of the County, may be granted the right to intervene by order of the Chairperson of the Procurement Appeals Board or Special Master in response to a petition to intervene. A petition to intervene shall be filed within five calendar (5) business days of receiving notice of the filing of a formal written protest. Failure to timely file a petition to intervene shall constitute a waiver of all rights to intervene in the subject protest proceeding. Petitions to intervene will be considered by the Chairman of the Procurement Appeals Board, and any decision concerning a Petition to Intervene shall be made by the Chairman and shall be deemed final.~~
- ~~2. Time Limits. The time limits in which formal written protests shall be filed as provided herein may be altered by specific provisions in the the invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposalsolicitation or upon the mutual written consent of the Protestor and the County.~~
- ~~3. Entitlement to Costs. In no case will the Protestor or Intervenor be entitled to any costs incurred with the invitation to bid, request for proposals, invitation to negotiate, request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, including, but not limited to bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.~~
- ~~4. After a formal written protest has been filed with the Purchasing Director, the Protestor may not discontinue such appeal without prejudice, except as authorized by the Procurement Appeals Board or Special Master.~~
- ~~5. Stay of Procurement During Protests. In the event of a timely protest under Section 5.13(B) herein, the Purchasing Director shall not proceed further with the solicitation or award of the contract until all administrative remedies have been exhausted or until the County Administrator makes a written determination that the award of a contract without delay is necessary to protect the substantial interests of the County. Additionally, the County Administrator, or designee may execute an extension of current contract(s) to ensure the continuation of critical services.~~

CD. Protest of Intended Decisions.

1. Upon timely receipt of a notice of intent to protest an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and a copy of this Section. The Purchasing Director shall within two (2) business days mail-send a copy of the notice of intent to protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposalsthe subject solicitation.
2. Upon timely receipt of a formal written protest of an Intended Decision, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and will notify the Chairman of the Procurement Appeals Board. The Purchasing Director shall within two (2) business days mail-send a copy of the formal written protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposalsthe subject solicitation.

3. Procurement Appeals Board. There is hereby established a Procurement Appeals Board to be composed of a chairperson and two members and two alternates. ~~The chairperson, members, and alternates of the Procurement Appeals Board shall be appointed by the County Administrator. The terms of office of the chairperson, members, and alternates of the Procurement Appeals Board shall be three years. For the initial appointments, the County Administrator shall appoint the chairperson for a term of three years, one member and one alternate for a term of two years, and one member and one alternate for a term of one year so that a term of office expires every year. Thereafter, their~~ Successors shall be appointed for terms of three years, or for the balance of any unexpired term, but members may continue to serve beyond their terms until their successors are appointed ~~take office~~. ~~Members may be reappointed for succeeding terms.~~
- a) ~~The Purchasing Division~~ Attorney representing the Procurement Appeals Board is authorized to provide ~~for the Procurement Appeals Board~~ such administrative support as the Chair ~~person~~ man requests in the scheduling and hearing of formal written protests.
- b) Acting by two or more of its members, the Procurement Appeals Board shall issue a decision in writing or take other appropriate action on each formal written protest submitted. A copy of any decision shall be provided to all parties and the Purchasing Director.
- c) Procurement Appeals Board Proceedings Procedures
- 1) ~~1)~~ 1) ~~The Procurement Appeals Board shall, unless otherwise mutually agreed upon by~~
all parties, at the earliest of fourteen (14) business days but no later than twenty-one (21) business days of receiving notice of a formal written protest, schedule a protest proceeding and give reasonable notice to all substantially affected persons or businesses, including the Protestor, and any Intervenor. Notice of such proceeding shall be publicly advertised in accordance with Section 50.0311(3), Florida Statutes, or as otherwise required by law.
- 2) ~~At least three (3) business days or~~ prior to the protest proceeding, the Protestor and/or Intervenor ~~and/or~~ as County, as the case may be, may submit any written or physical materials, objects, statements, affidavits, and arguments which he/she deems relevant to the issues raised to the Procurement Appeals Board a response to the arguments contained within the formal written protest.
- 3) ~~In the protest proceeding, the Protestor, and/or Intervenor, and/or County as the case may be, or his the representative or counsel of each, may also make an oral presentation of his the its evidence and arguments.~~
- 4) ~~Each party shall have no more than twenty (20) minutes to present its arguments and the arguments presented shall be confined to the formal protest and/or response. Further, only reasonable direct and cross-examination of witnesses shall be permitted, at the discretion of the Chairman of the Procurement Appeals Board.~~
The members of the Procurement Appeals Board may make whatever inquiries they deem pertinent to a determination of the protest.
- 4) ~~The judicial rules of evidence shall not strictly apply; however, witnesses shall be sworn, and any testimony taken under oath and, the members of the Procurement Appeals Board shall base their decision on competent, substantial evidence.~~
- 5) ~~The protest proceeding shall be de novo. Any prior determinations by~~

administrative officials shall not be final or conclusive.

- ~~56)~~ - ~~Within seven (7) working business days of~~At the conclusion of the protest proceeding, the Procurement Appeals Board shall render a decision. Within seven (7) business days of rendering the decision, the decision shall be ~~The Procurement Appeals Board decision shall be~~ reduced to writing and provided to the Protestor and/or Intervenor, as the case may be, and the County. The decision of the Procurement Appeals Board shall constitute final agency action.
- 76) Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

D. General Provisions

1. Intervenor. Any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject solicitation under Sections 6.08.1, 6.08.2, 6.08.3, or 6.08.4 of this Policy and who has a substantial interest in the Intended Decision or Procurement Award of the County, may be granted the right to intervene by order of the Chairperson of the Procurement Appeals Board in response to a petition to intervene. A petition to intervene shall be filed within three (3) business days of receiving notice of the filing of a formal written protest. Failure to timely file a petition to intervene shall constitute a waiver of all rights to intervene in the subject protest proceeding. Petitions to intervene will be considered by the Chairperson of the Procurement Appeals Board, and any decision concerning a Petition to Intervene shall be made by the Chairperson and shall be deemed final.
2. Time Limits. The time limits in which formal written protests shall be filed as provided herein may be altered by specific provisions in the solicitation or upon the mutual written consent of the Protestor and the County.
3. Entitlement to Costs. In no case will the Protestor or Intervenor be entitled to any costs incurred with the subject solicitation under Sections 6.08.1, 6.08.2, 6.08.3, or 6.08.4 including, but not limited to bid preparation costs, lost profits, bid protest costs, and/or attorney's fees.
4. After a formal written protest has been filed with the Purchasing Director, the Protestor may not discontinue such appeal without prejudice, except as authorized by the Procurement Appeals Board.
5. Stay of Procurement During Protests. In the event of a timely protest under Section 6.09(B) herein, the Purchasing Director shall not proceed further with the solicitation or award of the contract until all administrative remedies have been exhausted or until the County Administrator makes a written determination that the award of a contract without delay is necessary to protect the substantial interests of the County. Additionally, the County Administrator, or designee may execute an extension of current contract(s) to ensure the continuation of critical services.

E. Protest of Procurement Awards; Special Master Proceedings.

- ~~1. Upon timely receipt of a notice of intent to protest a Procurement Award of the County, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and a copy of this Section. The Purchasing Director shall within one business day mail send a copy of the notice of intent.~~

- ~~2. to protest to all persons who responded to the solicitation.~~
- ~~2. Upon timely receipt of a formal written protest of a Procurement Award of the County, the Purchasing Director shall provide the Protestor with acknowledgement of receipt and will notify the County Attorney of the protest. The Purchasing Director shall within one business day mail send a copy of the formal written protest to all persons who responded to an invitation to bid, a request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals.~~
- ~~3. Appointment of a Special Master. The County Administrator shall appoint and retain a special master or shall contract with the Florida Division of Administrative Hearings for an administrative law judge to act as a special master to conduct evidentiary proceedings regarding formal written protests of Procurement Awards. Each special master shall be a licensed attorney with the Florida Bar who has practiced law in Florida for at least five years, and who has experience in procurement law, local governmental law, or administrative law. Each special master appointed and retained by the County shall serve at the pleasure of the County Administrator and shall be compensated at a rate or rates to be fixed by the County Administrator. The expense of each special master proceeding shall be borne equally by the Protestor and the County.~~
- ~~4. Ex parte communication.
 - ~~a) No county employee, elected official, or other person who is or may become a party to a proceeding before a special master may engage in an ex parte communication with the special master. However, the foregoing does not prohibit discussions between the special master and county staff that pertain solely to scheduling and other administrative matters unrelated to the merits of the hearing.~~
 - ~~b) If a person engages in an ex parte communication with the special master, the special master shall place on the record of the pending case all ex parte written communications received, all written responses to such communications, a memorandum stating the substance of all oral communications received, and all oral responses made, and shall advise all parties that such matters have been placed on the record. Any party desiring to rebut the ex parte communication shall be entitled to do so, but only if such party requests the opportunity for rebuttal within ten days after notice of such communication. If he or she deems it necessary due to the effect of an ex parte communication received by him, the special master may withdraw from the case.~~~~
- ~~5. Powers of special masters. The special masters who conduct hearings pursuant to this section shall have the powers of hearing officers enumerated in F.S. § 120.569(2)(f), as amended.~~
- ~~6. Prehearing requirements. At least fourteen days prior to the date set for the hearing, the parties shall exchange a list of names and addresses of witnesses planned to testify at the hearing, and a list of exhibits planned to be introduced at the hearing, as well as produce the physical exhibits for inspection by the parties. Each party is entitled to depose witnesses scheduled to testify at the evidentiary hearing.~~
- ~~7. Hearings.
 - ~~a) All hearings shall be commenced within forty five (45) days of the date of the filing of the formal written protest. Requests for continuance by any party, either before or during the hearing, may be considered upon good cause shown.~~
 - ~~b) All hearings shall be open to the public.~~~~

- ~~e) The participants before the special master shall be the Protestor, the Protestor's witnesses, if any, county staff and witnesses, and any Intervenor. The participation of Intervenors shall be governed by the terms of the order issued by the special master in response to a petition to intervene. Intervention may only be permitted to any person, hereinafter referred to as Intervenor, who has submitted a timely response to the subject invitation to bid, request for proposals, an invitation to negotiate, a request for qualifications, or multi-step sealed bids, or multi-step requests for proposals, and who has a substantial interest in the Procurement Award.~~
- ~~d) Testimony and evidence shall be limited to matters directly relating to the formal written protest. Irrelevant, immaterial, or unduly repetitious testimony or evidence may be excluded.~~
- ~~e) All testimony shall be under oath. The order of presentation of testimony and evidence shall be as set forth by the special master.~~
- ~~f) To the maximum extent practicable, the hearings shall be informal. All parties shall have the opportunity to respond, to present evidence and provide argument on all issues involved which are related to the formal written protest, and to conduct cross-examination and submit rebuttal evidence. During cross-examination of witnesses, questioning shall be confined as closely as possible to the scope of direct testimony and matters involving impeachment. The special master may call and question witnesses or request additional evidence as he or she deems necessary and appropriate.~~
- ~~g) The special master shall render a final order on the formal written protest to the parties within ten days after the hearing concludes unless the parties waive the time requirement. The final order shall contain written findings of fact and conclusions of law, which shall then be presented to the Board of County Commissioners for ratification or other final disposition.~~

CLAIMS

- ~~A. Authority to Settle Contract Controversies. This Section applies to controversies between the County and a contractor and which arise under, or by virtue of, a contract between them. This includes without limitation controversies based upon breach of contract, mistake, misrepresentation, or other cause for contract modification or rescission, where the contractor and County agree to utilize the provision of this section.~~
 - ~~1. The Purchasing Director, or designee is authorized to settle any controversy arising out of the performance of a County contract, prior to the commencement of an action in a court of competent jurisdiction up to \$10,000 in value.~~
 - ~~a) If such a controversy is not resolved by mutual agreement, the Purchasing Director shall promptly issue a decision in writing. A copy of the decision shall be mailed or otherwise be furnished to the contractor immediately. The decision shall:
 - ~~1) State the reason for the action taken; and,~~
 - ~~2) Inform the Contractor of its right to administrative review as provided in this section.~~~~
 - ~~b) If the Purchasing Director does not issue a written decision required in paragraph (a) of this subsection within 30 days after written request for a final decision, or within such longer period as may be agreed upon by the parties, then the contractor may proceed as if an adverse decision had been received.~~
 - ~~c) The decision of the Purchasing Director may be appealed to the Procurement Appeals Board by the protestor by filing a formal written appeal with the Purchasing Director within five calendar days of receipt of the Purchasing Director's decision.~~

- ~~2. The Procurement Appeals Board is authorized to review any appeal of a decision on a contract controversy by the Purchasing Director or to hear any contract controversy in excess of \$10,000.~~
- ~~3. The Procurement Appeals Board shall promptly decide the contract or breach of contract controversy. The proceeding shall be de novo and shall follow the Proceeding Procedures contained in Section 5.13 (E)(3). Any prior determination by administrative officials shall not be final or conclusive.~~

~~Section 5.15~~ **REMEDIES FOR SOLICITATIONS OR AWARDS IN VIOLATION OF LAW**

- ~~A. Prior to Bid Opening or Closing Date for Receipt of Proposals. If prior to the bid opening or the closing date for receipt of proposals, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation is in violation of federal, state, or local law or ordinance, then the solicitation shall be canceled or revised to comply with applicable law.~~
- ~~B. Prior to Award. If after bid opening or the closing date for receipt of proposals, but prior to the award of contract, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation or a proposed award of a contract is in violation of federal, state, or municipal law or ordinance, then the solicitation or proposed award shall be canceled.~~
- ~~C. After Award. If, after award, the Purchasing Director, after consultation with the County Attorney, determines that a solicitation or award of a contract was in violation of applicable law or ordinance, then:
 - ~~1. If the person awarded the contract has not acted fraudulently or in bad faith:
 - ~~a) the contract may be ratified and affirmed, provided it is determined that doing so is in the best interest of the County; or~~
 - ~~b) the contract may be terminated, and the person awarded the contract shall be compensated for the actual costs reasonably incurred under the contract, plus a reasonable profit, prior to termination, but excluding attorney's fees; or~~~~
 - ~~2. If the person awarded the contract has acted fraudulently or in bad faith, the contract may be declared null and void or voidable, if such action is in the best interests of the County.~~~~

Section 5.168.01 **OWNER DIRECT PURCHASES IN PUBLIC WORKS CONTRACTS**

It is the policy of Leon County, Florida that all owner direct purchases for supplies and materials for use in public works projects be made in accordance with [Section 212.06\(6\) Florida Statutes](#) and [rule 12A-1.094 Florida Administrative Code](#), as they may be amended from time to time.

The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of owner direct purchases for supplies and materials for use in public works projects. In addition, the Purchasing Division shall provide training for project managers and other fiscal staff involved in contracts that may utilize owner direct purchases.

Section 5.178.02 **EMPLOYMENT ELIGIBILITY AND VERIFICATION**

- A. [State and](#) Federal statutes and executive orders require employers to abide by the immigration laws of the United States and to employ in the United States only individuals who are eligible to work in the United States. It is the policy of Leon County, Florida that unauthorized aliens shall not be employed nor utilized in the performance of contracted services for the County, in accordance with the [Illegal Immigration Reform and Immigrant](#)

Responsibility Act of 1996, as amended (8 U.S.C. § 1324a), and Subpart 22.18 of the Federal Acquisition Register.

B. Employment Eligibility Verification.

~~1.—This section on employment eligibility verification (“E-Verify”) requirements shall apply to contractors and subcontractors providing goods or performing contracted services for the County.~~

~~1. —By providing goods and/or services to the County, each Contractor and Subcontractor is obligated to comply with the provisions of Section 448.095, Florida Statutes., “Employment Eligibility.” Compliance with Section 448.095, Florida Statutes, includes, but is not limited to, utilization of the Department of Homeland Security’s E-Verify system (E-Verify) to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien.~~

~~2. Each Contractor and subcontractor must register with and use the Department of Homeland Security’s E-Verify system E-Verify Program for Employment Verification. Contractor further agrees to provide to the County, within thirty days of the effective date of this contract/amendment/extension, documentation of such enrollment in the form of a copy of the E-Verify “Edit Company Profile” screen, which contains proof of enrollment in the E-Verify Program (this page can be accessed from the “Edit Company Profile” link on the left navigation menu of the E-Verify employer’s homepage).~~

~~1.—This section on employment eligibility verification (“E-Verify”) requirements shall apply to contractors and subcontractors performing contracted services for the County, where the contracted services are funded pursuant to federal grants, federal contracts, state grants, or state contracts.~~

~~2.— Each Contractor and subcontractor, as defined in this section, shall agree to ~~must enroll register with and participate use in the Department of Homeland Security’s E-Verify system federal E-Verify Program for Employment Verification under the terms provided in the “Memorandum of Understanding” governing the program. Contractor further agrees to provide to the County, within thirty days of the effective date of this contract/amendment/extension, documentation of such enrollment~~ in the form of a copy of the E-Verify “Edit Company Profile” screen, which contains proof of enrollment in the E-Verify Program (this page can be accessed from the “Edit Company Profile” link on the left navigation menu of the E-Verify employer’s homepage).~~

~~3. 3.— Contractor further agrees that it will require each subcontractor that performs work under this contract to provide the Contractor with an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. The Contractor shall maintain a copy of such affidavit for the~~

~~duration of the contract. enroll and participate in the E-Verify Program within sixty days of the effective date of this~~

~~contract/amendment/extension or within sixty days of the effective date of the contract between the Contractor and the subcontractor, whichever is later. The Contractor shall obtain from the subcontractor(s) a copy of the “Edit Company Profile” screen, indicating enrollment in the E-Verify Program and make such~~

~~record(s) available to the Agency upon request.~~

~~4.— Contractor will utilize the U.S. Department of Homeland Security’s E-Verify system to verify the employment eligibility of: (a) all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida; and (b) all persons (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement.~~

~~a) Contractor must use E-Verify to initiate verification of employment eligibility for all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida within three business days after the date of hire.~~

~~b) Contractor must initiate verification of each person (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement within 60 calendar days after the date of execution of this contract or within 30 days after assignment to perform work pursuant to the Agreement, whichever is later.~~

~~54.~~ Contractor further agrees to maintain records of its participation and compliance with the provisions of the E-Verify program, including participation by its subcontractors as provided previously, and to make such records available to the County or other authorized state entity consistent with the terms of the Memorandum of Understanding and conditions governing the use of the E-verify system.

~~6.~~ Compliance with the terms of this Employment Eligibility Verification provision is made an express condition of this contract and the County may treat a failure to comply as a material breach of the contract.

C. The Purchasing Director shall establish administrative procedures, processes, and forms necessary for the implementation and administration of this policy section. In addition, the Purchasing Division shall provide training for project managers and other staff involved in contracts that may utilize E-Verify requirements.

**Section 96
ADMINISTRATION**

CONTRACT

The Purchasing Director or designee shall serve as the chief contract administrator for the County. The Purchasing Director shall establish administrative procedures, ~~and processes, and~~ processes and shall acquire any tools necessary for the implementation and operation of a comprehensive contract administration program. In addition, the Purchasing Division shall provide initial contract administration training for project managers and update training as deemed necessary.

Section 96.01 CONTRACT PROVISIONS

- A. Standard Contract Clauses and Their Modification. The Purchasing Director, after consultation with the County Attorney, may establish standard contract clauses for use in County contracts. However, the Purchasing Director may, upon consultation with the County Attorney, vary any such standard contract clauses for any particular contract.
- B. Contract Clauses. All County contracts for supplies, services, and construction shall include provisions necessary to define the responsibilities and rights of the parties to the contract. The Purchasing Director, after consultation with the County Attorney, may propose provisions appropriate for supply, service, or construction contracts, addressing among others the following subjects:
1. the unilateral right of the County to order, in writing, changes in the work within the scope of the contract;
 2. the unilateral right of the County to order, in writing, temporary stopping of the work or delaying performance that does not alter the scope of the contract;
 3. variations occurring between estimated quantities or work in contract and actual quantities;
 4. defective pricing;
 5. time of performance and liquidated damages;
 6. specified excuses for delay or nonperformance;
 7. termination of the contract for default;
 8. termination of the contract in whole or in part for the convenience of the County;
 9. suspension of work on a construction project ordered by the County;
 10. site conditions differing from those indicated in the contract, or ordinarily encountered, except that a differing site conditions clause need not be included in a contract:
 - a) when the contract is negotiated;
 - b) when the contractor provides the site or design;
 - c) when the parties have otherwise agreed with respect to the risk of differing site conditions.
 11. value engineering proposals.

~~Section 6.2 PRICE ADJUSTMENTS~~

- ~~A. Methods of Price Adjustment. Adjustments in price during the term of a contract shall be computed in one or more of the following ways upon approval by the Board:~~
- ~~1. by agreement on a fixed price adjustment before commencement of the pertinent performance or as soon thereafter as practicable;~~
 - ~~2. by unit prices specified in the contract or subsequently agreed upon;~~
 - ~~3. by the costs attributable to the events or situations under such clauses with adjustment of profit or fee, all as specified in the contract or subsequently agreed upon by the Board;~~
 - ~~4. in such other manner as the contracting parties may mutually agree; or~~

~~5. in the absence of agreement by the parties, by a unilateral determination by the County of the costs attributable to the events or situations under such clauses with adjustment of profit or fee as computed by the County, subject to the provisions of this section.~~

~~B. B. Cost or Pricing Data Required. A contractor shall be required to submit cost or pricing data if any adjustment in contract price is subject to the provisions of this Section.~~

Section ~~96.023~~ CHANGE ORDERS/CONTRACT AMENDMENTS

A. Change Orders. Change Orders are written documentation reflecting changes made to stipulations, condition, or terms of the contract during the contract period whether the contract is a capital improvement or a consultant services contract. ~~The purchasing categories' thresholds designated in Sections 6 shall govern the appropriate level of approval.~~ There are two types of change orders that may be made to these contracts.

1. Field Change Order. This change order is identified in the original approved contract as a contingency and is referred to as a field change order. It is customary in more complex contracts to include a contingency for changes to the original contract through Field Change Orders. For contracts of less than \$1,000,000, a contingency may be included generally not to exceed 10% of the contract value, unless circumstances justify same. For contracts in excess of \$1,000,000, a contingency shall be included, but shall generally not exceed 5% of the original contract value, unless circumstances justify same.

When a contract is approved with such a contingency, the Project Manager with the concurrence of the respective Department Director or designee is authorized to approve one or more Change Orders up to the aggregate monetary value of the contingency. The contract must contain an approved contingency clause for this type of Field Change Order such as "The contract price includes a 5% or 10% (whichever is applicable) contingency amount for change orders that may be authorized at the discretion of the County."

Alternately, as a part of the project award recommendation, staff may propose an alternate amount for the level of pre-approved field Change Orders based upon the known complexity of the project; the certainty of unknown factors such as asbestos abatement or unknown conditions in rehabilitation; or other such factors for consideration by the Board.

2. Approved Change Order. Any Change Order, the cost of which exceeds the Field Change Order Threshold amount, or a Change Order which amends the scope of work or services in a significant manner, shall be considered by the County Administrator or designee. In the event a budget amendment is required, the procedures of the Office of Management and Budget shall apply to the amendment.

B. Contract Amendments. Contract amendments, other than change orders, which provide for the alteration of specifications, delivery point, time, payments, quantity, or similar provisions of a contract without changing the scope of the project, may be approved by an appropriate person based upon the dollar value of the amendment. The purchasing categories' thresholds designated in Sections ~~65 through 5.09~~ shall govern the appropriate level of approval.

Section ~~96.034~~ ASSIGNMENTS OF CONTRACTS

No agreement made pursuant to any section of this policy shall be assigned or sublet as a whole or in part without the written consent of the County nor shall the contractor assign any monies due or to become due to the contractor hereunder without the previous written consent of the County.

~~Section 6.5~~ — ~~RIGHT TO INSPECT PLANT~~

~~The County may, at its discretion, inspect the part of the plant or place of business of a contractor or any subcontractor, which is related to the performance of any contract awarded, or to be awarded, by Leon County. The right expressed herein shall be included in all contracts or subcontracts that involve the performance of any work or service involving Leon County.~~

~~Section 7~~ — ~~RIGHTS OF BOARD OF COUNTY COMMISSIONERS~~

~~Nothing in this Policy shall be deemed to abrogate, annul, or limit the right of the Board in accordance with Florida law and in the best interests of the County, to reject all bids/proposals received in response to a solicitation, to determine in its sole discretion the responsiveness and responsibility of any bidder/proposer, to approve and authorize or to enter into any contract it deems necessary and desirable for the public welfare, or to vary the requirements of the Policy in any instance when necessary and desirable for the public welfare.~~

~~Section 108~~ — ~~COUNTY PROCUREMENT RECORDS~~

~~A. A.~~ Procurement Files. All determinations and other records pertaining to the solicitation, award, or performance of a

contract shall be maintained for the County in appropriate files by the Purchasing Director.

B. Retention of Procurement Records. All procurement records shall be retained and disposed of by the County in accordance with records retention guidelines and schedules established by the State of Florida.

~~Section 119~~ — ~~SPECIFICATIONS~~

~~Section 119.01~~ — ~~MAXIMUM PRACTICABLE COMPETITION~~

All specifications shall be drafted to promote overall economy and encourage competition in satisfying the County's needs and shall not be unduly restrictive. This policy applies to all specifications including, but not limited to, those prepared for the County by architects, engineers, designers, and draftsmen.

~~Section 119.02~~ — ~~USE OF BRAND NAME OR EQUIVALENT SPECIFICATIONS~~

A. Use. Brand name or equivalent specifications may be used when the Purchasing Director determines that:

1. no other design, performance, or qualified product list is available;
2. time does not permit the preparation of another form of purchase description, not including a brand name specification;
3. the nature of the product or the nature of the County requirements makes use of a brand name or equivalent specification suitable for the procurement; or
4. use of a brand name or equivalent specification is in the County's best interests.

B. Designation of Several Brand Names. Brand name or equivalent specifications shall seek to designate three, or as many different brands as are practicable, as "or equivalent" references and shall further state that substantially equivalent products to those designated may be considered for award.

~~C.A. C.~~ Required Characteristics. Unless the purchasing agent determines that the essential characteristics of the brand names included in the specifications are commonly known in the industry or trade, brand name or equivalent specifications shall include a description of the particular design, functional, or performance characteristics required.

- D. Nonrestrictive Use of Brand Name or Equivalent Specifications. Where a brand name or equivalent specification is used in a solicitation, the solicitation shall contain explanatory language that the use of a brand name is for

the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.

B. E.—Determination of Equivalents. Any prospective bidder may apply, in writing, for a pre-bid determination of equivalence by the Purchasing Director. If sufficient information is provided by the prospective bidder, the Purchasing Director may determine, in writing and prior to the bid opening time, that the proposed product would be equivalent to the brand name used in the solicitation.

F. F.—Specifications of Equivalents Required for Bid Submittal. Vendors proposing equivalent products shall include in their bid submittal the manufacturer's specifications for those products, unless directed otherwise in the bid document. Brand names and model numbers are used for identification and reference purposes only.

Section 119.03 -BRAND NAME SPECIFICATIONS

A. Use of Brand Name Specifications. Since use of a brand name specification is restrictive of product competition, it may be used only when the Purchasing Director makes a determination that only the identified brand name item or items will satisfy the County's needs.

C. B.—Competition. The Purchasing Director or designee shall seek to identify sources from which the designated

brand name item or items can be obtained and shall solicit such sources to achieve whatever degree of price competition is practicable. If only one source can supply the requirement, the procurement shall be made under Section ~~5.106.05~~, Single and Sole Source Purchases.

Section 120 — ETHICS IN PUBLIC CONTRACTING

Section 120.01 CRIMINAL PENALTIES

To the extent that violations of the ethical standards of conduct set forth in this Section constitute violations of the State Criminal Code they shall be punishable as provided therein. Such penalties shall be in addition to civil sanctions set forth in this part.

Section 120.02 EMPLOYEE CONFLICT OF INTEREST

A. A.—Participation. It shall be unethical for any County employee to participate directly or indirectly in a procurement contract when the County employee knows that:

- 1. 1.**—the County employee or any member of the County employee's immediate family (father, mother, brother, sister, child, grandparent, or grandchild of employee or spouse) has a financial interest pertaining to the procurement contract; or
2. any other person, business, or organization with whom the County employee or any member of a County employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement contract.

B. B.—Blind Trust. A County employee or any member of a County employee's immediate family who holds a financial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that financial interest.

Section 102.03 CONTEMPORANEOUS EMPLOYMENT PROHIBITED

It shall be unethical for any County employee who is participating directly or indirectly in the procurement process to become or to be, while such a County employee, the employee of any person contracting with the County.

Section 120.04 USE OF CONFIDENTIAL INFORMATION

It shall be unethical for any employee knowingly to use confidential information for actual or anticipated personal gain, or for the actual or anticipated personal gain of any other person.

Section 120.05 WAIVERS FROM CONTEMPORANEOUS EMPLOYMENT PROHIBITION AND OTHER CONFLICTS OF INTEREST

The County Administrator may grant a waiver from the employee conflict of interest provision or the contemporaneous employment provision upon making a written determination that:

- A. the contemporaneous employment or financial interest of the County employee has been publicly disclosed;
- B. ~~the~~ County employee will be able to perform his procurement functions without actual or apparent bias or favoritism; and
- ~~C. the~~ award will be in the best interest of the County.

Section 120.06 GRATUITIES AND KICKBACKS

- A. **Gratuities.** It shall be unethical for any person to offer, give, or agree to give any County employee, or for any County employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or performing in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, subcontract, or to any solicitation or proposal therefor.
- B. **Kickbacks.** It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.
- C. **Contract Clause.** The prohibition against gratuities and kickbacks prescribed in this section shall be conspicuously set forth in every contract and solicitation therefore.

Section 102.07 SANCTIONS

- A. ~~Employee Sanctions.~~ Upon violation of the ethical standards by an employee, the County Administrator, Purchasing Director, or other appropriate authority may:
 - 1. impose one or more appropriate disciplinary actions as defined in the County Personnel Rules and Regulations, up to and including termination of employment; and,
 - 2. may request investigation and prosecution.
- B. **Non-employee Sanctions.** The Board may impose any one or more of the following sanctions on a non-employee

for violation of the ethical standards:

1. written warnings;
2. termination of contracts; or
3. debarment or suspension as provided in Section 175.

Section 129.08 RECOVERY OF VALUE TRANSFERRED OR RECEIVED IN BREACH OF ETHICAL STANDARDS

A. General Provisions. The value of anything being transferred or received in breach of the ethical standards of this policy by a County employee or a non-employee may be recovered from both County employee and non-employee.

~~B.~~ D. Recovery of Kickbacks by the County. Upon a showing that a subcontractor made a kickback to a prime

contractor or a higher tier subcontractor in connection with the award of a subcontract or order there under, it shall be conclusively presumed that the amount thereof was included in the price of the subcontract or order and ultimately borne by the County and will be recoverable hereunder from the recipient. In addition, that amount may also be recovered from the subcontractor making such kickback. Recovery from one offending party shall not preclude recovery from other offending parties.

Section 131 FEDERAL REQUIREMENTS

Section 134.01 PATENTS

If a contract involving research and development, experimental, or demonstration work is being funded in whole or in part by assistance from a federal agency, then the contract shall include the following provisions.

A. Notice to Contractor. The contract shall give notice to the contractor of the applicable grantor agency requirements and regulations concerning reporting of, and rights to, any discovery or invention arising out of the contract.

B. Notice by Contractor. The contract shall require the contractor to include a similar provision in all subcontracts involving research and development, experimental, or demonstration work.

Section 134.02 FEDERAL PUBLIC POLICY REQUIREMENTS

A. Applicability. If a contract is being funded in whole or in part by assistance from any federal agency, either directly or as a pass-through, the contract is subject to one or more federal public policy requirements such as:

1. equal employment opportunity;
2. affirmative action;
3. fair labor standards;
4. energy conservation;
5. environmental protection; or
6. other similar socio-economic programs.

B. It is the policy of the Leon County Government to obtain commodities and services efficiently and effectively in free and open competition for the Federal Grant and Aid Programs (including Federal pass-through grants such as the Community Development Block Grant) through the use of sound procurement practices. All County staff and other persons (subgrantees or contractors) with designated responsibility for the administration of Federal Grant award contracts are responsible for ensuring compliance with all applicable federal and state laws and regulations. These include but are not limited to OMB Circular A-102, Attachment

Purchasing Policy

Q; 2 CFR Part 200.317-.326; ~~sSection.~~ 255.0525, Florida Statutes; ~~sSection.~~ 287.055, Florida Statutes; ~~sSection.~~ 290.047, Florida Statutes; Chapter 73C-23, Florida Administrative Code; and, the Purchasing Policy of ~~the~~ Leon County, ~~Florida Government~~ and any subsequent revisions to any of the above laws, rules, and regulations.

C. The County Purchasing Policy shall govern the procurement of commodities and services for the Federal Grant and Aid Programs except as provided in this section unless otherwise required in the grant award.

1. – In the event of declaration of emergency by the Chairman of the Board, the Purchasing Policy shall be suspended, and the guidelines of Federal Regulation 2 CFR Part 200 shall be utilized, to include, but not be limited to procurement thresholds.

~~4.2.~~ Local Preference Program is not applicable to Federally funded programs.

~~2.3.~~ The Tallahassee-Leon County Office of Economic Vitality's Minority, Women, and Small Business

Enterprise Policy is not applicable to Federally funded programs. Instead, the following affirmative steps shall be taken and documented to ensure that these firms are used when possible:

- a) Place qualified small, minority, and women owned businesses on solicitation lists;
- b) Assure that small, minority, and women owned businesses are solicited when they are potential sources;
- c) Divide total requirement, when economically feasible, into smaller tasks or quantities to permit maximum participation by small, minority, and women owned businesses;
- d) Establish delivery schedules, when requirements permits, which encourage participation by small, minority, and women owned business enterprises;
- e) Use service and assistance from such organization as Small Business Administration (SBA) and the Minority Business Development Agency of the Department of Commerce; and
- f) Require the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs a through e of this section.

4. All procurement of commodities or services in excess of \$2,000 shall require a written agreement embodying all provisions and conditions thereof.

5. All procurement of commodities or services in excess of \$2,000 and less than the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes may be entered into only after informal competition based on offers or quotes from not less than three (3) vendors, unless otherwise required in the grant or aid program.

6. Publication of public notice for invitations to bid or requests for proposals and notification of the solicitation through distribution to potential bidders or offerors shall be required for all procurement in excess of the threshold amount provided for CATEGORY TWO in s. 287.017, Florida Statutes. The time frames in section ~~65~~.08 of this policy shall apply for the required public notice.

7. Except as may otherwise be provided by law, procurement awards shall be made only on the basis of requirements and evaluation factors related to the price or quality of the commodities or services or to the ability of the prospective supplier or contractor to perform under the agreement. In evaluating the ability of a prospective contractor to perform, the County shall at a minimum consider the prospective contractor's record of past performance under similar federal grants.

8. Nothing herein shall prohibit the County from utilizing a single source procurement (Section ~~5-106.05~~, Single and Sole Source Purchases) or procurement from another unit of government (Section ~~5-126.07~~, Cooperative Purchasing).

D. Notice. The Purchasing Director shall include in the contract all appropriate provisions giving the contractor notice of these requirements. Where applicable, the Purchasing Director shall include in the contract provisions the requirement that the contractor give a similar notice to all of its subcontractors.

Section 142
REQUIREMENTS

INSURANCE

- A. -Minimum Requirements. Contractor shall purchase and maintain such insurance as will protect it from claims under Workers' Compensation laws, disability benefit laws or other similar employee benefit plans; from claims or damages because of bodily injury, occupational sickness or disease or death of its employees and claims insured by usual personal injury liability coverage in amounts determined by the provisions of the Risk Management Policy.
- D. Certificates of Insurance. Certificates of Insurance acceptable to the County shall be filed with the Purchasing Division prior to the commencement of the work and periodically thereafter upon any renewals during the term of the contract.
- C. Change of Insurance Requirements. The Board of County Commissioners reserves the right to change the insurance requirements based on the project scope, or when determined in the best interest of the County.

Section 153
DEPOSITS

BONDS AND

When any of the following bonds ~~is~~(are) required, the bond(s) will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the appropriate bond(s) is (are) accepted by the County.

Section 153.01 **TYPES OF BONDS AND DEPOSITS:**

- A. Combination Payment and Performance Bond - This type of bond is required for repairs, renovations, new construction, and ~~other~~ public works costing in excess of \$200,000. For projects less than that amount, it may be required at the discretion of the Purchasing Director or designee. When a payment and performance bond is required, the bond will be requested in the bid document. No work in connection with the fulfillment of a contract shall commence until the payment and performance bond is accepted by the County.
- B. Performance Bond - For a project of an estimated value less than \$200,000, requirement of a performance bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to ~~insure~~ensure that a contract is carried out in accordance with the applicable specifications and at the agreed contract price. Architectural, Engineering, Landscape Architectural, and Surveying and Mapping Services are exempt from this requirement.
- C. Payment and Material Bond - For a project of an estimated value less than \$200,000, requirement of a payment and material bond will be at the discretion of the Purchasing Director or designee. For projects estimated to be \$200,000 or more, such bond will be required to protect the County from suits for non-payment of debts, which might be incurred by a contractor's performance for the County.
- D. Warranty Bonds - At the discretion of the Purchasing Director, after consultation with user departments, a Warranty Bond may be required from a successful bidder to ~~insure~~ensure warranty provisions are fulfilled.
- E. Guaranty of Good Faith Deposit (Bid Deposit) - For projects estimated to be less than \$200,000, requirement of a bid bond will be at the discretion of the Purchasing Director or designee. For purchases where it is determined by the Purchasing Director to be in the best interest of the County, and projects estimated to be \$200,000 or more, bidders will be required to submit with their bid or proposal a guaranty of good faith deposit. When in the best interest of the County, it is recommended by the Purchasing Director and approved by the County Administrator or his designee, these requirements may be waived.
 - 1. Return of Bond. Such deposit may not be withdrawn until a specified time after the proposals are opened and awards made. The deposit of the bond shall be retained by the Finance Officer of the Board until the

Purchasing Director is satisfied that the Contractor's obligations have been satisfactorily completed.

2. Substitutes. In lieu of a surety bid bond, contractor may 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. Such deposits shall be retained by the Finance Officer of the Board until all provisions of the contract have been met.

~~F. Irrevocable Letter of Credit. Upon approval of the Purchasing Director, a contractor may present an Irrevocable Letter of Credit from a national or state chartered bank in lieu of any of the foregoing bonds for the same face value as required for the bond. The letter of credit shall be for a period of time not less than three months beyond the scheduled completion date of the purchase of the contracted services or materials.~~

FG. Retention of Payments. The County may require the payment for a project, or a portion thereof, be withheld until the project has been completed as a method of protecting the County's interest. Retention may also be used in lieu of the above listed bonds. The solicitation documents shall specifically state if retention of any portion or all of the payment for the project is to be done.

GH. Waiver of Bonds. When it is in the best interest of the County, the bonding requirements referenced in sections A – E above may be waived when 1) it is in the best interest of the County, and 2) it is recommended by the Purchasing Director and approved by the County Administrator or his designee.

Section ~~153.02~~ **AMOUNT OF BOND OR DEPOSIT**

A. ~~A.~~ Amount of Bond. Bonds or deposits, which may be required, shall normally be in the following amounts, except as provided in the following subsection B.

1. ~~1.~~ Performance Bond: 100% of contract price.

2. Payment Bond: 100% of contract price.

3. Payment and Performance Bond: 100% of contract price.

4. Guaranty of Good Faith Deposit (Bid Deposit or Bond): The bid deposit will be 5% of the price bid by the vendor.

B. Exceptions to Amount of Bond. Any of the previously listed bonds may be required at another amount recommended by the Purchasing Director and approved by the County Administrator or his designee when in the best interest of the County.

Section ~~153.03~~ **PROCESSING OF BONDS AND DEPOSITS**

A. Responsibility for Securing Bonds. The contractor shall be responsible for securing the bond. Any costs may be included in the contract price.

B. Licensure of Bonding Company. The company acting as surety for any bond issued shall be licensed to do business in the State of Florida.

C. Review of Bonds by County Attorney or designee. Surety bonds furnished will be reviewed by the County Attorney or designee, who shall either accept or reject it for the Board. ~~All surety bonds accepted shall be forwarded to the Finance Officer of the Board by the Purchasing Director to be filed in the official records of the Board.~~

E. Failure to Provide Required Bond. In the event a contractor fails to provide an acceptable bond when required,

within 10 days after notification, the County Attorney will be notified. Upon the recommendation of the County Attorney, the Board may declare the contract null and void, and retain in the account of Leon County any good faith deposits or guaranty which may have been submitted as liquidated damages under the terms of the solicitation.

Division a formal notice of payment dispute in writing within ~~five~~^{two} (52) business days of the dispute first being raised.

~~1.~~ 1. The notice of payment dispute shall contain at a minimum: the name of the vendor; the vendor's address and phone number; the name of the vendor's representative to whom notices may be sent; the contract number associated with the payment dispute; and, a brief factual summary of the basis of the dispute.

~~1.2.~~ 1.2. Waiver. Failure to timely file a written payment dispute shall constitute a waiver of proceedings under this section.

3. Upon timely receipt of a formal payment dispute, the Contract ~~Manager~~ ~~Administrator~~ shall provide the vendor with acknowledgement of receipt, will notify the Payment Dispute Resolution Committee, and will coordinate with all parties to establish the date and time for a Payment Dispute Resolution Proceeding.

D. General Provisions

1. Time Limits. Proceedings to resolve the dispute shall be commenced not later than ~~45~~ 30 calendar days after the date on which the payment request or proper invoice (as specified in the contract document) was received by the County and shall be concluded by final decision of the County not later than ~~60~~ 45 calendar days after the date on which the payment request or proper invoice was received by the County.
2. Protest. Dispute resolution procedures shall not be subject to ~~e~~Chapter 120, Florida Statutes, and such procedures shall not constitute an administrative proceeding, which prohibits a court from deciding de novo any action arising out of the dispute.
- ~~3.~~ 3. Interest. If the dispute is resolved in favor of the County, then interest charges shall begin to accrue 15 calendar days after the County's final decision. If the dispute is resolved in favor of the vendor, then interest shall begin to accrue as of the original date the payment became due.
- ~~4.~~ 4. Any party may arrange for the proceedings to be stenographically recorded and shall bear the expense of such recording.

E. Payment Dispute Resolution Proceeding Process

1. All formal payment disputes shall be presented to the Payment Dispute Resolution Committee. The committee shall be comprised of the Contract Manager, Purchasing Director, and appropriate Division Director for the County or their designees.
- ~~2.~~ 2. Within three (3) business days of timely receipt of a formal notice of payment dispute, the Contract Manager shall schedule a proceeding before the Payment Dispute Resolution Committee to include all substantially affected persons or businesses, including the vendor and County ~~P~~project ~~M~~anager. Non-appearance by the vendor shall constitute a forfeiture of proceedings with prejudice.
- ~~3.~~ 3. At or prior to the dispute proceeding, the vendor and ~~P~~project ~~M~~anager, may submit any written or physical materials, objects, statements, affidavits, and arguments which he/she deems relevant to the payment dispute.
- ~~1.~~
- ~~2.~~
- ~~4.~~ 4. In the proceeding, the vendor and ~~P~~project ~~M~~anager, or his representative or counsel, may also make an oral presentation of his evidence and arguments. Further, only reasonable direct and cross-examination of witnesses shall be permitted, at the discretion of the Chairman of the Payment Dispute Resolution Committee. The members of the Payment Dispute Resolution Committee may make whatever inquiries they deem pertinent to a determination of the dispute.
 - a) The judicial rules of evidence shall not strictly apply; however, witnesses shall be sworn, and any testimony taken under oath and, the members of the Payment Dispute Resolution Committee shall base their decision on competent, substantial evidence. The proceeding shall be de novo. Any prior

determinations by administrative officials shall not be final or conclusive.

- b) Within three business days of the conclusion of the proceeding, the Payment Dispute Resolution Committee shall render a decision. The Payment Dispute Resolution Committee decision shall be reduced to writing and provided to the vendor and the County ~~P~~project ~~M~~anager. The decision of the Payment Dispute Resolution Committee shall be final and conclusive for all disputes valued less than \$100,000.
- c) For those disputes valued above \$100,000, the Payment Dispute Resolution Committee shall file a Recommended Agency Order for approval by the County Administrator or his designee.

Section 175 AUTHORIZATION TO DEBAR OR SUSPEND VENDOR(S)

A. ~~A.~~ Suspension. After consultation with the County Attorney, the Purchasing Director is authorized to suspend a person from consideration for award of contracts if there is probable cause to believe that the person has engaged in any activity, which might lead to debarment. The suspension shall be for a period not to exceed three (3) months, and the Purchasing Director shall immediately inform the Board and provide notice to the affected person.

B. ~~B.~~ Debarment. After reasonable notice and a reasonable opportunity for the suspended person to be heard, the Board shall either disbar such person or terminate the suspension. The debarment should be for a period of not more than three (3) years.

C. Causes for Debarment. The causes for debarment include:

1. ~~1.~~ ~~e~~Entry of a plea of guilty, no contest, or nolo contendere to or conviction 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;

1. ~~1.~~

2. ~~2.~~

2. ~~2.~~ ~~e~~Entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal statutes of 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 responsibility as a County contractor;

3. ~~e~~Entry of a plea of guilty, no contest, or nolo contendere to or conviction under state or federal antitrust statutes arising out of the submission of bids or proposals;

4. ~~v~~Violation of contract provisions, as set forth below, of a character which is regarded by the Board to be so serious as to justify debarment action:

- a) deliberate failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or

- b) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for debarment;

5. ~~5.~~ ~~h~~Having been adjudicated guilty of any violation by the Leon County Contractor's Licensing Board, or the State of Florida Construction Industry Licensing Board within the past twelve (12) month period at the time of bid submittal;

2. ~~2.~~

6. ~~6.~~ ~~h~~Having been adjudicated guilty by the Leon County Code Enforcement Board of any violation of

an

environmental ordinance within the past six (6) month period at the time of bid submittal; and

7. aAny other cause the Purchasing Director or Board determines to be as serious and compelling as to affect responsibility as a County contractor, including debarment by another governmental entity.

- D. Notice of Decision. The Purchasing Director shall issue a written notice to the person of the decision to debar or suspend. The decision shall state the reasons for the action taken and inform the debarred or suspended person involved of his/her rights concerning judicial or administrative review. The written decision shall be mailed or otherwise furnished immediately to the debarred or suspended person.

Section 175.01 APPEAL OF DECISION TO DEBAR OR SUSPEND

The Board's decision to debar or suspend a person or business shall be final and conclusive unless the debarred person commences a timely action in court in accordance with applicable law.

Revised ~~July 13, 2021~~ October 8, 2024