

**INDIAN RIVER COUNTY
OFFICE OF MANAGEMENT AND BUDGET
PURCHASING DIVISION**

DATE: April 7, 2022

TO: BOARD OF COUNTY COMMISSIONERS

THROUGH: Jason E. Brown, County Administrator
Kristin Daniels, Budget Director

FROM: Jennifer Hyde, Purchasing Manager

SUBJECT: Adoption of Revised Purchasing Manual

BACKGROUND:

Indian River County Code Chapter 105 details Purchasing procedures and limits, and specifically establishes the County Administrator's purchasing authority. Other local purchasing thresholds and policies are established under the County Administrator's authority and detailed in the Purchasing Manual, as required by County Code Section 105.06. The Purchasing Manual is reviewed at least annually and updated as needed. Staff has identified several modifications to the Purchasing Manual that should be made to enhance the efficiency of our procurement processes, and ensure compliance with recent changes to Statute and the Code of Federal Regulations.

Although the County Administrator has authority to approve changes to the manual, staff presents the changes to the Board and the public as a courtesy. The new manual will be posted to the County web site for easy access.

DISCUSSION:

The notable modifications made to the Purchasing Manual include:

- ✓ Updated the sections of 2 C.F.R. referenced as applicable to federally-funded procurements, as an additional section was added relating to domestic preference in procurements that involve iron, aluminum, steel, cement and other manufactured products. Also added requirement for U.S. Flags purchased for display at County facilities to be Made in the U.S.A.
- ✓ Updated name of ERP software system from Munis to Tyler Enterprise ERP
- ✓ Clarified authorities to waive bid technicalities and irregularities to match authority levels for award
- ✓ Removed 24-hour time limit for departments to provide missing information to requisitions before they are rejected by the Purchasing Division
- ✓ Added instruction that when quotes are obtained, the lowest quote is expected to be selected
- ✓ Added requirement for shipping to be included in requisition total, due to change in invoice processing procedures
- ✓ Added the steps for purchase order deductive change orders
- ✓ Added vendor requirement to participate in E-Verify, as required by 287.137, Florida Statutes
- ✓ Updated Purchase Order Exempt items

- ✓ Updated list of online suppliers
- ✓ Updated invoice processing and fiscal year end procedures
- ✓ Added limit of three years for sole source designation, per Board's direction
- ✓ Streamlined the emergency PO request procedure
- ✓ Clarified the process to obtain a bid number
- ✓ Added the requirement for a clear description of the goods/services needed to bidding, RFP and RFQ procedures, to comply with 2 C.F.R.
- ✓ Added E-verify and Foreign Assets Sanctions list as sources bidders will be verified against
- ✓ Extended the time for a bidder to request withdrawal of bid from 24 to 48 hours
- ✓ Added a reminder regarding the limit of the County Administrator's authority for CCNA work authorizations and of the requirement to provide work authorizations and change orders to Finance
- ✓ Added requirement for submittal of 10-year litigation history in RFQ process, per Board direction
- ✓ Removed requirement to score submittals when only one responsive proposal is received
- ✓ Added authorization for selection committee to recommend rejection of RFPs and RFQs received, and to request authorization to negotiate, or directly recommend award in an RFP
- ✓ Modified the appeal procedure to enable the County Administrator to hear the appeal in circumstances that do not require Board consideration, in line with Section 100.06, Indian River County Code
- ✓ Added authorized purchasing card transactions relating to travel
- ✓ Added option for disciplinary action for misuse of purchasing card after any violation
- ✓ Added Information Technology procurement process for hardware, software, phones and accessories
- ✓ Added Appendix section, which includes hyperlinks to various checklists, and instructions reference information for other resources. These references and documents will be updated independently from the purchasing manual, and as necessary without need for the County Administrator's approval.

RECOMMENDATION

Staff recommends the Board note its concurrence with the changes approved by the County Administrator.

ATTACHMENTS:

Proposed Changes to Purchasing Manual