

# Leon County Research and Development Authority

## Policy No. 11-3

Title: Purchasing Policy  
Date Adopted: May 10, 2011  
Date Revised: August 2, 2011  
Effective Date: May 10, 2011

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### 1. PURPOSE

- a. The purpose of Policy No. 11-3, “Purchasing Policy” is to provide guidelines for the purchases of goods and/or services made by or on behalf of the Leon County Research and Development Authority (hereinafter referred to as the “Authority”). Purchases not explicitly covered in these guidelines are to be approved in advance by the Board of Governors (hereinafter referred to as the “Board”).

### 2. SCOPE

- a. This policy applies to:
  - i. Members of the Board and employees of the Authority, or
  - ii. Individuals or organizations contracted to do business on behalf of the Authority, all of whom are defined as “agents”.
- b. Each contract or agreement for the purchase of goods or services shall include the following Equal Opportunity provision:

During the performance of this Agreement, the (vendor) (contractor) (service provider) (other) agrees not to discriminate against any employee or applicant for employment because of race, color, religion, sex or national origin.

### **3. PURCHASING CATEGORIES**

#### **a. Purchases: \$2,500 or Less**

The purchase of goods or services that cost \$2,500 or less does not require independent approval of the Board provided that funds for such purchase have been included in the current year's approved budget. The agent making the purchase shall, in his or her reasonable discretion, obtain the best quality goods or services at the lowest total cost.

In the event funds for a purchase have not been designated in the current year's budget approved by the Board, the agent shall obtain the approval of the Board prior to the purchase.

#### **b. Purchases: \$2,500 to \$10,000**

The purchase of goods or services that cost more than \$2,500, up to and including \$10,000, does not require independent approval of the Board provided that funds for such purchase have been included in the current year's approved budget. In the event funds for a purchase have not been designated in the current year's budget approved by the Board, the agent shall obtain the approval of the Board prior to the purchase.

The agent shall endeavor to obtain quotes, from at least three different vendors, for the cost of providing the relevant goods and services. Written quotes shall be obtained if the purchase price exceeds \$5,000. The agent making the purchase shall, in his or her reasonable discretion, obtain the best quality goods or services at the lowest total cost. The agent has the right, to reject all quotes submitted for a specific purchase pursuant to this paragraph.

#### **c. Informal Bids: \$10,000 to \$50,000**

The purchase of goods or services that cost more than \$10,000 and up to and including \$50,000 does not require independent approval of the Board provided that funds for such purchase have been included in the current year's approved budget. In the event funds for a purchase have not been designated in the current year's budget approved by the Board, the agent shall obtain the approval of the Board prior to the purchase.

The agent shall endeavor to obtain quotes, from at least three different vendors, for the cost of providing the relevant goods and services. The Board shall authorize the purchase from the vendor that the Board, in its sound discretion, believes will provide the highest quality goods and services at the lowest cost. The Board has the right, in its sole discretion, to reject all informal bids submitted for a specific purchase pursuant to this paragraph.

**d. Competitive Procurement: \$50,000 or more**

The purchase of goods or services that total \$50,000 or more shall require prior approval of the Board. The Board shall obtain such purchases through competitive procurement except as otherwise provided in paragraphs 3, e, f, and g.

The agent shall draft the appropriate notice of intent to procure the goods or services, which may, as appropriate, contain specifications of the specific goods or service to be purchased. The agent shall endeavor to obtain proposals, from at least three different vendors, for the cost of providing the relevant goods and services. The notice of intent shall be approved by the Board, and shall then be published in a local newspaper of general circulation approved for legal publication once and posted on the Authority's website at least 20 days before bids are due. The Board shall award the contract to the vendor, which the Board, in its reasonable discretion, best meets the criteria contained in the procurement. The Board has the right, in its sole discretion, to reject all bids submitted for a specific purchase pursuant to this paragraph.

**e. Emergency Purchases**

In the event of an accident or emergency that threatens the safety, financial viability or a substantial loss to the Authority, as determined to exist by the agent and the Chair of the Board, in their reasonable discretion, purchases in any amount may be made by the agent without compliance with the guidelines described above. In making purchases in such an emergency situation, the agent shall, in his or her reasonable discretion, obtain the highest quality goods and services at the lowest cost. Any purchase made pursuant to this paragraph shall be immediately reported in writing to the Board.

**f. Sole Sources**

In the event the Board makes a written determination that a particular good or service, or aggregate thereof, is only available from a single source, such item(s) may be purchased from such source without further compliance with these guidelines.

**g. Other Exceptions**

The following contracts, or acquisitions of goods or services, are exempt from compliance with these guidelines provided such contracts and acquisitions are authorized and approved by the Board and are:

- i. goods and services acquired through participation in a cooperative purchasing agreement with one or more public entities or pursuant to Chapters 255 and 287 Florida Statutes;
- ii. changes, amendments or change orders to existing contracts that do not exceed 25% of the contracted value;
- iii. purchases pursuant to grant requirements;
- iv. a project where the contractor or builder has been selected by the tenant and use of such contractor or builder is a condition of the tenancy, if:
  - 1. the estimated costs of construction are reviewed by an architect, if appropriate, selected by the tenant or its agent and such architect certified in writing that such costs are competitive in the market place;
  - 2. the tenant or contractor or builder is legally obligated for the complete and total repayment of any debt incurred by the Authority in connection with such a project.

**h. Construction of Facilities for Lease to the State**

The construction of facilities in connection with the lease of space to executive agencies, departments or other political subdivisions of the State shall be competitively bid in accordance with the requirements of state law, including Section 255.2501, Florida Statutes.

**i. Procurement Review**

The contracts and performance of vendors retained by the Authority shall be reviewed at least every three years.