

## IMPORTANT REMINDERS

### Unauthorized Purchases

Committing City funds without an approved Purchase Requisition & PO/Contract is prohibited and may lead to disciplinary action or personal liability.

### Plan Ahead

Procurement takes time! Engage Procurement Services early, especially for complex or high-value needs.

### Requisition First

A Purchase Requisition approved through the financial system is required BEFORE making most commitments.

### Read the Manual

This is a quick reference guide. The Procurement Manual and Ordinance contain the full policies and procedures.

### Ethics Matter!

- Act in the City's best interest.
- Avoid conflicts of interest (real or perceived).
- Do not accept gifts/gratuities that could influence decisions.
- Ensure fair treatment of all vendors.
- Report concerns. (*Refer to the Procurement Ordinance Sec. 37 & Procurement Manual Sec. 1.5*)

## PROCUREMENT THRESHOLDS

### Up to \$2,500 (Micro Purchase)

- Delegated Authority to Depts
- P-Card / PO / Direct Payment
- Processing Time: 0 - 3 days.

### \$2,500 - \$10,000 (Small Purchase)

- One (1) written quote required.
- P-Card / PO / Direct Payment
- Processing Time: 1 - 4 days.

### \$10K-\$100K (Intermediate Purchase)

- Three (3) written quotes required
- Quote Approval Request (>\$25K).
- Processing Time: 1 - 5 days

### Over \$100K (Formal Solicitation)

- Completion of a formal solicitation process required.
- Solicitation issued by Procurement Services
- Solicitation Request Form with detailed specifications and/or scope of work required.
- Processed in 30 - 120 days.

## PROCUREMENT APPROVAL AUTHORITY

### Up to \$25K

Chief Procurement Officer

### \$25K to \$100K

City Manager

### Over \$100,000

City Commission



## CITY OF FLORIDA PROCUREMENT HUB

<https://floridaprocurementhub.com/>

## OFFICE OF PROCUREMENT SERVICES

## Procurement Quick Reference Guide

(One-Pager)

John Doe, Chief Procurement Officer

1234 Strategic Sourcing Street,

Florida Procurement Hub, FL 33333

[JDoe@FloridaProcurementHub.com](mailto:JDoe@FloridaProcurementHub.com)

Phone: 111-111-1111

## LOCAL VENDOR PREFERENCE

A “Local Vendor”, defined as a business meeting specific criteria regarding a permanent place of business, duration, employees, function, and local business tax receipt with City limits, is eligible for the Local Vendor Preference Program and Set-Aside Program. (*Refer to the Procurement Ordinance Sec. 39 & Procurement Manual Sec. 8.2*)

Local Vendor Preference includes:

- **IFBs:** Eligible local vendor within 5% of low non-local bid may get chance to match/beat.
- **RFPs/etc.:** Preference factor (e.g., points) may apply as stated in solicitation.
- **Set-Aside:** Certain services <\$100k may be reserved for local vendors if at least 3 qualified local vendors exist.
- **Exceptions Apply:** (e.g., Grants, Emergencies).

## SURPLUS PROPERTY

Report surplus and/or obsolete City property to the Procurement Office for disposal by transfer, trade-in, sale/auction, donation, and/or Scrap.

## KEY PROCUREMENT METHODS

### Purchase Requisition

Using Agency’s internal request to initiate a purchase; required to start the procurement process.

### Purchase Order (PO)

Formal contract document issued by the Procurement Office authorizing vendors to provide the solicited goods/services; encumbers funds.

### Procurement Card (P-Card)

Charge card issued to authorized employees for small-dollar purchases under specific limits & rules (See *P-Card Manual*).

### Invitation for Bids (IFB)

Formal solicitation method used when specs are clear; award based on lowest responsive, responsible bid.

### Request for Proposals (RFP)

Formal solicitation method used when factors beyond price are key; award based on Best Value.

### Request for Qualifications (RFQ)

Formal solicitation method based on qualifications (e.g., CCNA professional services).

## EXCEPTIONS & OTHER METHODS

### Sole Source

Purchase without competition when only ONE source is practicably available. Requires justification and CPO determination on appropriate use. Public notice typically required >\$10k; Commission approval >\$100k. *Lack of planning is NOT justification.*

### Emergency

Immediate purchase needed due to threat to health, safety, welfare, or critical operations. Requires City Manager or CPO authorization & full documentation afterward. *Use only for true emergencies.*

### Cooperative Purchasing ("Piggybacking")

Using contracts competitively awarded by other government entities or approved cooperatives. Requires justification and piggyback request, and CPO determination on appropriate use; must be in City's best interest.

### Direct Payment

Used for specific exempt payments (e.g., utilities, memberships) where competitive purchasing doesn't apply; also called a “Check Request”.