

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

SWFD PROCUREMENT POLICY (2019.01) PURCHASING OF GOODS AND SERVICES

PURPOSE

The purpose of this policy is to guide the District's employees when making purchases for the District. At all times, purchases, and the procedure used to accomplish a purchase, will comply with Florida law, including but not limited to, Florida Statute § 255.20 and Florida Statute § 287.055, concerning construction and related professional services.

PURCHASING PROCEDURES

The purchasing of goods and services will be based on a variety of factors including, but not limited to, cost, quality, delivery, continuity of operations, and customer support after the sale. At all times, decisions on District purchases must include a verification of whether the purchase supports a public purpose of the District, whether the purchase is in the best interest of the District, and whether the purchase constitutes an ordinary, reasonable and necessary purchase. This Board adopted procurement policy (2019.01) shall serve as an addendum in whole to Article XII "Procurement Policy – Purchasing of Goods and Services" as provided for within the By-Laws of the South Walton Fire District. The following purchasing categories are established for the procurement of goods and services for the District. All such purchases must fall within the approved budget. The Board of Fire Commissioners may adjust the purchase price thresholds for purchasing categories from time to time. The specific purchasing procedures for the stated purchasing categories are as follows:

Category One (Purchases under \$1,500)

Single item purchases with a procurement price under \$1,500 shall be carried out using good and reasonable judgment; however, there shall not be any specific competitive selection procedure required. Purchase approval by the Fire Chief may be verbal however all invoices for payment shall be executed by the Fire Chief, or his designee for proper accountability and tracking.

Category Two (Purchases \$1,500 and up to \$5,000)

Single item purchases with a procurement price of \$1,500 and up to \$5,000 shall be carried out using good and reasonable judgment; however, there shall not be any specific competitive selection procedure required. Once the purchase selection information is assembled by the assigned District employee, a written report indicating the District employee's purchase recommendation will be issued and provided to the Fire Chief, or his designee, for the Chief's approval/selection of a vendor and purchase terms.

Category Three (Purchases Greater than \$5,000 and up to \$10,000)

Single item purchases with a procurement price greater than \$5,000 and up to \$10,000 shall be made by using a competitive selection process. The preference is to receive two (2) or more written purchase price quotations whenever practical. In the event it is impractical to receive two (2) or more written purchase price quotations, two (2) or more verbal purchase price quotations should be received and recorded in a

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

written memorandum by the assigned District employee. At a minimum, a written purchase price quotation or the written memorandum of a verbal purchase price quotation should contain the name and address of the vendor, the purchase price that is quoted and a description of the item being purchased which shall include the manufacturer name and model number along with detailed specification to positively identify the item. In the event two (2) or more purchase price quotations are not available, i.e. where there is a sole source vendor, the assigned District employee shall provide a written statement as to why multiple purchase price quotations were not received. Once the purchase selection information is assembled by the assigned District employee, a written report indicating the District employee's purchase recommendation will be issued and provided to the Fire Chief, or his designee, for the Chief's approval/selection of a vendor and purchase terms.

Category Four (Purchases Greater than \$10,000 and up to \$100,000)

Single item purchases with a procurement price that is greater than \$10,000 and up to \$100,000 shall be made by using a competitive selection process. Two (2) or more written purchase price quotations must be received and recorded by the assigned District employee. Verbal purchase price quotations are not acceptable. At a minimum, a written purchase price quotation should contain the name and address of the vendor, the purchase price that is quoted and a description of the item being purchased which shall include the manufacturer name and model number along with detailed specification to positively identify the item. In the event two or more purchase price quotations are not available, i.e. where there is a sole source vendor, the assigned District employee shall provide a written statement as to why multiple written purchase price quotations were not received. Once the purchase selection information is assembled by the assigned District employee, a written report indicating the District employee's purchase recommendation will be issued and provided to the Fire Chief / Administrator for approval/selection of a vendor and purchasing terms. If South Walton Fire District determines in writing, after reviewing any information received from prospective vendors that the commodities or contractual services are available only from a single source, then South Walton Fire District shall provide notice of its intended decision to enter a sole-source purchase contract in the manner specified in Florida Statute § 287.057(3)(C).

Category Five (Purchases Greater than \$100,000)

Single item purchases with a procurement price that is greater than \$100,000 shall be made by using a competitive selection process. Two (2) or more written purchase price quotations must be received and recorded by the assigned District employee. Verbal purchase price quotations are not acceptable. At a minimum, a written purchase price quotation should contain the name and address of the vendor, the purchase price that is quoted and a general description of the item being purchased which shall include the manufacturer name and model number along with detailed specification to positively identify the item. In the event two (2) or more purchase price quotations are not available, i.e. where there is a sole source vendor, the assigned District employee shall provide a written statement as to why multiple written purchase price quotations were not received. Once the purchase selection information is assembled by the assigned District employee, a written report indicating the District's purchase recommendation will be provided to the Board of Fire Commissioners for approval/selection of a vendor and purchasing terms. If South Walton Fire District determines in writing, after reviewing any information received from prospective vendors that the commodities or contractual services are available only from a single source, then South

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

Walton Fire District shall provide notice of its intended decision to enter a sole-source purchase contract in the manner specified in Florida Statute § 287.057(3)(C).

PURCHASING APPROVAL AUTHORITY

Purchasing authority identifies who must approve the procurement of goods and services up to a dollar threshold amount and when a purchase must be brought before the Board of Fire Commissioners for approval and award (All such purchases must fall within the approved budget).

Fire Chief / Administrator	Single item purchases not to exceed \$100,000
Board of Fire Commissioners	Single item purchases over \$100,000

CONTRACT SIGNATURE AUTHORITY

Fire Chief / Administrator	Annual agreements not to exceed \$100,000
Board of Fire Commissioners	Annual agreements over \$100,000

CONTRACT RENEWAL

Once a service provider has been selected in accordance with this policy, a contractor agreement may be renewed or extended within the constraints of the approved budget at the discretion of the Fire Chief / Administrator to ensure continuity of operations and quality of service.

EXCEPTIONS

In an emergency as determined by the Fire Chief and Board Chairman, authorization to contract in excess of \$100,000 is granted to the Fire Chief / Administrator along with the Chairman with the provision that it will be brought to the attention of the Board of Fire Commissioners at their next regularly scheduled meeting for "after-the-fact" approval to ratify said emergency contract. The Fire Chief / Administrator along with the Chairman may also elect to call a special meeting of the Board of Fire Commissioners.

Items previously approved by the Board of Fire Commissioners as a budget line item do not require board approval if purchased from a State Term Contract or other authorized cooperative agreement that has been competitively procured.

To the extent that purchases of insurance coverages for the District do not exceed the total yearly budget approved by the Board of Fire commissioners for such purchases in such budgetary year, authorization to purchase coverage in excess of \$100,000.00 is granted to the Fire Chief / Administrator.

The Board of Fire Commissioners reserves the right to accept or reject any and all bids, proposals, competitive or otherwise, in whole or in part, to waive informalities in the solicitation documents, to obtain

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

new bids, or to postpone the bid opening pursuant to the Board's purchasing policies as they may deem in the best interest of the Fire District.

PROCUREMENT CODE OF ETHICS

All employees are required to maintain high standards of ethics and conduct. Purchasing officials shall strive to maintain complete independence and impartiality in dealings with vendors to preserve the integrity of the competitive process and to ensure there is public confidence that Purchase Orders and contracts are awarded equitably and economically.

Each employee involved in purchasing shall read and follow the requirements of Chapter 112, Part III, Florida Statutes that includes the sections below.

SOLICITATION OR ACCEPTANCE OF GIFTS [F.S. 112.313(2)] No public officer, employee of the District, attorney, or candidate for nomination or election shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the public officer, employee, local government attorney, or candidate would be influenced thereby.

DOING BUSINESS WITH ONE'S AGENCY [F.S. 112.313(3)] No employee of the District acting in his or her official capacity as a purchasing agent, or public officer acting in his or her official capacity, shall either directly or indirectly purchase, rent, or lease any realty, goods, or services for the Fire District from any business entity of which the officer or employee or the officer's or employee's spouse, sibling, parent, or child is an officer, partner, director, or proprietor or in which such officer or employee or the officer's or employee's spouse, sibling, parent, or child, or any combination of them, has a material interest.

EXCEPTION Should the District desire to purchase goods or services from a business entity in which an employee of the District or the employees' spouse, sibling, parent, or child is an officer, partner, director, or proprietor; the employee who has management or ownership interest of the vending business entity shall have no decision-making input regarding the purchase. Competitive selection in these instances shall be accomplished regardless of the purchase category threshold through the receipt of three (3) sealed written purchase price quotations. Verbal purchase price quotations shall not be acceptable when purchasing goods or services through a District employee. All written purchase price quotations shall contain the name and address of the vendor, the purchase price that is quoted and a general description of the item being purchased. Goods or services which are considered for purchase from a district employee shall only be awarded under a system of sealed, competitive bidding where the employee is determined to be the lowest or best bidder and:

1. The employee or the employees' spouse, sibling, parent, or child has in no way participated in the determination of the bid specifications or the determination of the lowest or best bidder;
2. The employee or the employee's spouse sibling, parent, or child has in no way used or attempted to use the official's influence to persuade the district to enter such a contract other than by the mere submission of the bid; and

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

3. The employee, prior to or at the time of the submission of the bid, has filed a statement with the Commission on Ethics, or with the Walton County Supervisor of Elections disclosing the employee's interest, or the interest of the employee's spouse, sibling, parent, or child, and the nature of the intended business.

In the event three (3) purchase price quotations are not available, i.e. where there is a sole source vendor, the assigned District employee shall provide a written statement as to why multiple written purchase price quotations were not obtained. This written statement shall include a full disclosure by the district employee of his or her personal interest in the business entity to the Board of Fire Commissioners prior to the purchase of any rental, sale, leasing, or other business being transacted.

Once all purchase selection information is assembled, a written report indicating the District's purchase recommendation for the procurement of goods or services through a District employee will be provided to the Board of Fire Commissioners for final approval/selection.

UNAUTHORIZED COMPENSATION [F.S 112.313(4)]. No public officer, employee of the District, or his or her spouse or minor child shall, at any time, accept any compensation, payment, or thing of value when such public officer or employee knows, or with the exercise of reasonable care should know, that it was given to influence a vote or other action in which the officer or employee was expected to participate in his or her official capacity.

DEFINITIONS

1. **Petty Cash Purchases** – Petty cash may be used for small purchases of materials, goods, or supplies purchased by a District employee which require reimbursement by the District. These purchases are limited to purchases under \$200. A Petty Cash Reconciliation with receipts is submitted by the Fiscal Officer to the Fire Chief / Administrator for approval when reimbursement of the petty cash fund is necessary.
2. **Exempt Purchases** – Certain other purchases are exempted from formal purchasing procedures due to the type of expense. These include expenses which are under contract or are contractual in nature (consultant fees, rental expenses) or ordinary, routine, unavoidable expenditures (payroll, utilities, insurance). The Fire Chief must approve these purchases prior to the disbursement of funds to a vendor and they must be funded within the approved budget. In the absence of the Fire Chief, exempt purchase invoices may be authorized by a designated Assistant Chief.
3. **Regular Purchases** – These are normal purchases of goods or services. Each budgeted expenditure line item is the responsibility of a designated staff member / program manager.

During the annual budget build process, the staff member / program manager determines the anticipated needs for the upcoming year and submits for approval through his/her chain of command. Once the fiscal year budget is approved following the final public budget hearing, the

SOUTH WALTON FIRE DISTRICT

911 North County Highway 393, Santa Rosa Beach, Florida 32459

"Prompt, Competent, Caring Response in Time of Need"



Ryan H. Crawford
Fire Chief / Administrator

staff member / program manager is responsible for ordering those goods and services ensuring they remain within the approved line item budget. All invoices must be stamped and signed indicating receipt by the staff member / program manager and submitted through their chain of command and ultimately to the Fire Chief / Administrator for approval prior to disbursement of funds by the Fiscal Officer. In the absence of the Fire Chief, regular purchase invoices may be approved by a designated Assistant Chief. All District disbursements (checks) shall be signed by the Fire Chief and a Fire Board member. In the absence of the Fire Chief, checks may be signed

by two (2) Fire Board members. Revenue and expenditure statements compared to budget are reviewed by all staff, the Fire Chief, and the Board of Fire Commissioners on a monthly basis.

4. **Capital Purchases** – Capital items are defined as those which will last three (3) years or more and have a purchase price of \$1,500 or more. These items must be separately designated as capital expenditures within the approved budget. Capital purchase requests must be initiated via a Purchase Requisition Form which may be obtained from DES and approved by the Fire Chief / Administrator. Once the internal Purchase Requisitions Form is approved, purchasing, invoice approval, and payment follow the same flow as regular purchases.

PASSED and ADOPTED by the South Walton Fire District Board of Fire Commissioners at a regular monthly meeting of the South Walton Fire District Board of Fire Commissioners of Walton County, Florida held on the 12th day of November 2019.

South Walton Fire District, Walton County, Florida

Maurice Gilbert, SWFD Board Chairman

ATTEST:

Charlotte Flynt, SWFD Secretary/Treasurer