



DATE
June 17, 2002

NO. 101

TITLE

PROCUREMENT POLICY

ORG. AGENCY
Blueprint
Intergovernmental
Agency

101.01 STATEMENT OF POLICY

It is the intent of the Blueprint Intergovernmental Agency (hereinafter called the “Agency”) to provide for on-time acquisition of competitive, quality products and services to support the operations of the Blueprint Intergovernmental Agency and the Office of Economic Vitality programs, to the extent this policy is not in conflict with OEV’s Travel and Hospitality Policy, adopted October 27, 2016, and as it may be amended from time to time, through the provisions established in this policy. *It is also the intent of the Agency to adopt the City of Tallahassee’s procurement policies and procedures except as otherwise noted.*

101.02 AUTHORITY

The Blueprint Interlocal Agreement, as it may be amended, from time to time, (hereinafter called the “Interlocal Agreement”), is a legal instrument between the City of Tallahassee and Leon County which authorized a joint project management structure for administering projects to be funded by the sales tax extension and provided the authority to establish a procurement policy.

101.03 OBJECTIVE

This policy shall provide the governing principles that establish the basic philosophies upon which the procurement functions of the Agency must operate. To achieve the aforementioned objective, all persons authorized to commit Blueprint Intergovernmental Agency and/or Office of Economic Vitality funds for the purchase of supplies and services shall:

- A. Ensure the uninterrupted flow of the services by obtaining and ensuring delivery of acceptable quality of supplies and services, at the right time and price.
- B. Comply with all applicable federal, state and local laws, statutes, ordinances and regulations governing local government procurement. Special emphasis shall be placed on ensuring that procurement actions comply with Chapter 112, Florida Statutes relating to ethical behavior in the acquisition of supplies and services.
- C. Provide fair and equitable treatment of all vendors who participate in procurement activities.
- D. No person or business shall be excluded from participation in, denied benefits of, or otherwise be discriminated against in connection with procurement activities on the grounds of race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), national origin, age (40 or older), disability or genetic information.

101.04 SCOPE AND APPLICABILITY

The policy outlined herein shall apply to the Agency and all employees referenced in the joint project management structure involved in any activities associated with the procurement of supplies or services for, or on behalf of, the Agency and related Agency programs.

101.05 DEFINITIONS

Blueprint Intergovernmental Agency or Blueprint: The legal entity formed by the City and County pursuant to section 163.01, Part I, Florida Statutes, as amended, to undertake the acquisition, financing, planning, construction, managing, operating, servicing, utilizing, owning and exchanging of the Blueprint 2000 Projects and Blueprint 2020 Infrastructure Projects and Economic Development Programs and to receive and expend the Dedicated 2000 surtax and the Dedicated 2020 Surtax proceeds as provided for by its governing documents.

Change Order: Modifications to a capital project contract’s work scope, cost, or schedule phasing, as authorized by the applicable authority.

Citizens Advisory Committee: The citizens committee provided for and referenced in the Interlocal Agreement.

Competition: The effort of two or more vendors to secure the business of a purchaser by the offer of the most favorable terms as to price, quality, promptness of delivery, or service in accordance with the provisions of a solicitation of such offers.

Competitive Negotiation: A method for procurement of supplies and services in which discussions attempting to reach agreement on terms and conditions of a contract may be conducted with multiple vendors who submit proposals in response to a solicitation.

Competitive Sealed Bid: A method for acquiring offers for procurement of goods, services, or construction in which award is made to the lowest responsive and responsible bidder based on responses to an invitation for bid received from qualified vendors.

Competitive Threshold: A dollar limit established by the Agency for the purpose of determining the method of procuring a particular supply or service. (See Appendix B for competitive threshold requirements attached as “Attachment 1”)

Continuing Services Agreement: A type of agreement that provides for furnishing of specified types of professional services for a stated term pursuant to an individual task or purchase order.

Contract: A written agreement, regardless of its title, which is signed on behalf of the Agency and one or more other parties and that sets forth specific terms and conditions for the procurement or furnishing of goods, services or professional services.

Contract Amendment: Any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provision of the contract, accomplished by mutual action of the parties to the contract.

Contracting Officer: An individual with the authority to enter into, administer, and/or terminate contracts, and make related determinations and findings.

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Department of PLACE: The Department of Planning, Land Management and Community Enhancement (“PLACE”) created by the City and County consisting of the Tallahassee –

Leon County Planning Department, the Leon County – City of Tallahassee Blueprint Intergovernmental Agency and the Office of Economic Vitality.

Intergovernmental Agency Board of Directors: Governing body, consisting of the City and County Commissions, of the joint project management structure, as provided in the Interlocal Agreement.

Interlocal Agreement: The agreement approved by the City Commission and County Commission in September 2000, and as it may be amended, from time to time, which specifies how sales tax proceeds are to be divided and utilized, creates the Blueprint Intergovernmental Agency and related joint project management structure, and lists the projects to be funded by the sales tax extension

Intergovernmental Management Committee: A committee consisting of the City Manager and County Administrator, as provided for in the Interlocal Agreement.

Non-Competitive Negotiations: A method for procurement of supplies and services in which discussions attempting to reach agreement on terms and conditions of a contract may be conducted with a single vendor.

Off-the-Shelf Purchase: An item produced and stocked in inventory by a vendor awaiting the receipt of orders or contracts for sale.

Procedure: The prescribed method or specific course of action that will accomplish the requirements of a policy.

Procurement: Buying, leasing, renting or otherwise acquiring any materials, supplies services, construction, and equipment, including description of specifications and requirements, selection and solicitation resources, preparation and award of contracts.

Purchasing Authority: The authority to approve the acquisition of supplies or services on behalf of the Agency. (See Appendix A for purchasing authority levels and specific thresholds)

Request for Quotation (RFQ): An informal solicitation or request for information, where oral or written quotes are obtained from vendors, without formal advertising or receipt of sealed bids.

Services: The furnishing of labor, time, or effort by a vendor, which does not result in the delivery of a tangible product.

Director of PLACE: The individual responsible for managing and directing the Tallahassee – Leon County Planning Department, Blueprint Intergovernmental Agency and the Office of Economic Vitality, reporting directly to the Intergovernmental Management Committee or their Designees.

Blueprint Director: The individual responsible for carrying out the implementation of the Blueprint 2000 projects and the Blueprint 2020 Infrastructure projects, reporting directly to the Director of PLACE.

Office of Economic Vitality Director: The individual responsible for carrying out the implementation of the Blueprint 2020 Economic Development Programs and the OEV programs, reporting directly to the Director of PLACE.

Office of Economic Vitality: The legal entity established by the City and County to implement and administer, on behalf of Blueprint, OEV programs and Blueprint 2020 Economic Development Programs.

Supplies: Commodities or equipment.

Technical Coordinating Committee: Staff committee established by the Interlocal Agreement to provide technical and professional advice and expertise on Agency projects and related matters.

Term Contract: A type of agreement that provides prices for specific types of goods or services (other than professional services) that is in effect for a stated term.

Vendor: Any natural person or business that responds to a solicitation relating to procurement of goods or services.

101.06 ROLES AND RESPONSIBILITIES

In that this policy provides for adoption of the City of Tallahassee’s procurement procedures, City departments referenced herein shall be responsible for providing the same level of service for Blueprint Intergovernmental Agency procurement activities as is provided for City procurement activities.

- A. All Employees of the Agency, in accordance with the requirements of their positions, shall be responsible for:
 - 1. Complying with all adopted purchasing procedures within the parameters of their position responsibilities (except as otherwise noted).
 - 2. Providing City Procurement Services with timely and accurate information to efficiently procure requested supplies/services.
 - 3. Providing necessary information and working with City Procurement Services in:
 - a. Evaluating vendor performance.
 - b. Resolving vendor grievances.
 - c. Identifying department procurement needs.
 - d. Evaluating vendor responses to solicitations.
 - e. Providing purchasing and vendors with necessary technical information.
 - f. Identifying alternative sources of supply.

- 4. Ensuring that City Procurement Services is made aware of all communications with vendors concerning:
 - a. Invitations for bids and requests for proposals that have been advertised and the bid opening date has not yet occurred;
 - b. Responses to invitations for bids and requests for proposals that have been received and opened, but not yet awarded; and
 - c. Potential contract amendments.

B. Intergovernmental Agency Board, as the overall governing body for the joint project management structure that administers Agency projects and the OEV programs as referenced in the Intergovernmental Agreement, shall:

- 1. Provide overall policy direction related to procurement activities.
- 2. Render a final decision on all purchases, contracts and change orders presented by the Intergovernmental Management Committee.

C. Intergovernmental Management Committee shall provide overall administration of procurement activities for the Blueprint Intergovernmental Agency projects and the OEV programs. This responsibility shall include:

- 1. Approving and submitting of all award recommendations presented to the Intergovernmental Agency Board by Agency staff.
- 2. Approving and awarding all purchases/contracts within designated managerial authority.
- 3. Recommending issuance of all Requests for Proposals (RFPs) and consider for approval all purchasing, contracts, and change orders to contracts up to 20% of the contract amount.
- 4. Recommending amendments to this Procurement Policy and approving all administrative procedures to ensure consistency and compliance with this Policy.

D. City of Tallahassee Procurement Services shall provide for the acquisition of materials, supplies and services for the Blueprint projects and the OEV programs, in accordance with City procurement procedures. These responsibilities include the following:

- 1. Providing appropriate procedures for the selection of vendors in accordance with applicable federal, state and local laws, statutes, ordinances and regulations governing municipal procurement.
- 2. Assisting in the development of invitations to bid and requests for proposal, administration of contracts and management of inventories of purchased goods.
- 3. Issuing and receiving responses to invitations to bid and requests for proposal in accordance with this Policy and related administrative procedures.

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4. Making a final determination and/or recommendation, in conjunction with Agency staff, for quote, bid and proposal awards, except where others are so authorized by the Intergovernmental Management Committee or the Agency Board.
5. Providing appropriate procedures for ensuring vendor protests of competitive sealed bids, competitive negotiations and requests for quotations are treated in a fair and objective manner.
6. Processing vendor payments in accordance with the City's Prompt Pay Policy and the Local Government Prompt Payment Act, Section 218.70, Florida Statutes.
7. Resolving complaints between the Agency and vendors regarding purchases of supplies and services.
8. Rejecting all bids or proposals received in response to a particular solicitation, when deemed appropriate by the Intergovernmental Management Committee.
9. Authorizing the termination of vendor relationships.
10. Maintaining vendor performance records.
11. Providing procedures for the evaluation of vendors including suspension and debarment.

E. Director of PLACE or his/her Designee is responsible for;

1. Approving and awarding all purchases/contracts within designated managerial authority.
2. Reviewing and recommending all procurement related awards submitted to the Intergovernmental Management Committee and the Agency Board.
3. Serving in the capacity of Contracting Officer for Blueprint and OEV.
4. Approving all extensions to the term of procurement related agreements as stipulated in the original terms and conditions of such agreements.
5. Executing all documents, including contracts and change orders, approved by the Agency Board, Intergovernmental Management Committee, and those within designated managerial authority.

F. Treasurer - Clerk's Office shall be responsible for the following, with regards to Blueprint Intergovernmental Agency procurement activities:

1. Countersigning all contracts made on- behalf of the Agency.
2. Ensuring contracts are executed and disseminated to the appropriate parties.

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3. Safekeeping all bid and contract performance security instruments, including without limitation bonds, cashier or certified checks, letters of credit, and assignments of certificates of deposit, submitted to the Agency.
 4. Handling concerns and issues relative to responding to requests for documents under the Public Records Act.
 5. Issuing petty cash funds.
- G. The Blueprint Attorney as legal advisor to the Director of PLACE and Agency staff with regards to procurement activities, shall be responsible for the following;
1. Advising personnel on procurement matters that arise as a result of Agency operations.
 2. Reviewing of contract documents prior to contract award for legal sufficiency and completeness.
 3. Endorsing on each procurement related agreement approval of the form and correctness of the document.
 4. Defending for and on behalf of the Agency, all complaints, suits and controversies in which the Agency is a party that arise as a result of procurement activities, in consultation with the Agency Board Attorney and/or City/County Attorney/Offices.
- H. Vendors interested in doing business with the Agency shall be responsible for:
1. Registering with the vendor database manager and distributor for all procurement solicitations.
 2. Ensuring that all business information set forth in the database, at any time, is current (i.e., address, contact person, product lines, etc.).
 3. Complying with all terms and conditions of the applicable solicitation, or other procurement related documents, in making an offer or proposal to the Agency and when conducting business with same.
 4. Ensuring the correctness, completeness and timeliness, of responses to procurement solicitations and invoices submitted for payments.

101.07 ADDITIONAL PROVISIONS AND EXCEPTIONS

1. Minority, Women and Small Business Enterprise (MWSBE) Program shall be administered in accordance with the MWSBE Policy approved by the IA Board on January 30, 2020, and as amended on September 21, 2023.

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2. Consultant Competitive Negotiation Act (CCNA) procedures as provided in Chapter 287.055 Florida Statutes shall be utilized for purchases/contracts consistent with the City's Procurement Procedures.
3. Expenditure Authority
 - a. Purchasing Authority is defined as follows:

Intergovernmental Agency Board	\$250,000 and over
Intergovernmental Management Committee up to	\$250,000* (see note)
Director of PLACE, Blueprint Director and Director of OEV up to	\$125,000

* Note: Without regard to the above threshold, which is established for Non – Capital Projects, the Intergovernmental Management Committee shall have the authority to award any contract if such is within the approved capital project budget and complies with all policies established herein.
 - b. Change Orders shall be authorized as follows:
 - 1) The Director of PLACE, or his/her designee, shall have the authority to approve change orders to contracts up to \$1,000,000.00 (one million dollars) provided funding is identified and available in the approved project budget.
 - 2) The Agency Board shall approve change orders to contracts which exceed \$1,000,000.00 (one million dollars); and change orders to contracts exceeding \$5,000,000.00 (five million dollars) in aggregate or require funding in excess of the total project budget.
4. Price agreements (City or County) shall be utilized whenever possible and do not require additional approval by the purchasing authority.
5. Continuing Service Agreements (City or County) for the provision of specified professional services shall be utilized where applicable and:
 - a. Have no threshold limit for professional fees.
 - b. Provide a specified contract period with optional extension periods as appropriate.
 - c. Provide a termination clause.

Each request for services under a Continuing Services Agreement shall contain a lump sum cost, a cost estimate or proposal, or other limitation and shall require approval in accordance with the above chart. The Agency will use its best efforts to implement a rotation system for consultants awarded a contract under a Continuing Services Agreement consistent with the MWSBE Consolidated Policy.

- 6. A formal contract shall be prepared for transactions for services that exceed \$50,000. Contract extensions that are included in the original terms and conditions **do not** require Agency approval. The Agency shall approve extensions to contracts that are not a part of the original terms and conditions.

- 7. Local Preference Policy (Attachment 2) as adopted by the Leon County Board of County Commissioners on March 26, 2002, shall be incorporated by reference into the Blueprint Intergovernmental Agency Procurement Policy, with the following exceptions:
 - a. the definition of “local business” shall be expanded to include the four county area of Leon, Wakulla, Gadsden, and Jefferson
 - b. primary residence of employees, or if the business has no employees, the business shall be at least 50% owned by one or more persons whose primary residence shall be within the four county area described in 101.07 (7).

101.08 SUNSET REVIEW

The Blueprint Procurement Policy shall be reviewed no later than five years from the effective date. Irrespective of this review period, the Director of PLACE is responsible for determining if changes to the City’s Procurement Policy need to be incorporated into this policy or if other changes are needed, and if so, shall submit the policy revisions to the Agency Board for review as needed, or at least 90 days prior to the sunset review date. If no action is taken on the policy prior to the sunset review date, the policy will automatically extend for another five-year period or until the Agency Board revises or terminates the policy.

101.09 EFFECTIVE DATE

This policy will become effective upon approval by the Blueprint Intergovernmental Agency Board. Approved June 17, 2002.

Revised: February 21, 2017
January 30, 2020
September 21, 2023