EVERYTHING YOU WANTED TO KNOW ABOUT PURCHASING BUT DIDN’T KNOW TO ASK
Presenters

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Franklin County
Agenda

Purchases under $50,000
Direct Purchases
Purchase Orders
Blanket Purchase Orders
Agenda

Purchases over $50,000
Invitation to Bid (ITB)
Request for Proposal (RFP)
Other Methods of Purchasing
Other Procedures
Purchases of Goods and Services

Purchases Under $50,000
Direct Vouchers

Limited to $100 unless resolution is passed raising maximum to $1000

Does not require a P.O.

May be a verbal order

Invoices paid directly by Auditor (does not require BCC approval)
Purchase Orders

All purchases over the Direct Voucher Limit require a Purchase Order (P.O.)

May require written quotes

All P.O.’s must have Auditor’s Certification of Funds and encumbrance

All P.O.’s must be approved by BCC or delegated officer
Purchase Orders

Recommended Procedure

P.O. is sent to vendor
Goods are received
P.O., receiving document, and invoice are matched
Payment is made
Blanket Purchase Orders

Used for small purchases of non-specific items
Encumber funds for specific line item appropriation
May remain open for entire fiscal year
Multiple blankets may exist at one time
Must follow regulations of the $50,000 Competitive Bid Threshold
Purchases of Goods and Services

Purchases for $50,000 and over
Invitation to Bid

Invitation to Bid (ITB)

Quantifiable items or specifications

Bids are evaluated

  By specifications

  By Price

No negotiations are allowed

  May seek clarifications

Bids become Public Record at Opening
Request for Proposal (RFP)

Qualitative or Performance Specifications

Structured evaluation process for each phase is developed when creating the proposal.
Request for Proposal (RFP)

Proposals are evaluated in phases
- Written submittal
- Administrative
- Technical
- Oral presentations (if needed)
Request for Proposal (RFP)

Contract Negotiations

May only negotiate with one offeror at a time

Highest ranked first

Negotiations can be stopped and proceed to next ranked bidder

Cannot go back to first bidder
Request for Proposal (RFP)

Contract Negotiations
   All terms and conditions
   Specifications (work)
   Delivery Schedule
   Pricing

Proposals only become Public Record after award of contract
Competitive Bidding Is Not Required

When:
- Emergency exists
- Sole Source
- Another Government Agency
- Public Social Services
- Group Insurance Programs
Competitive Bidding Notice

Must be advertised in a newspaper of general circulation two consecutive weeks
Second ad may be waived if posted on County web-site
Notice must include specifics of bid
Public bulletin board must be maintained
Bid Submission Requirements

Must be in County preferred format

Must be sealed

Opening and tabulation must be public and at advertised time and place

May include Bid Bond
Bid Bonds

Construction (Required)

Bond for full amount of bid or
Certified or Cashier’s Check or Letter of Credit for 10% of bid amount

All other Bids (Permissive)

Should be sufficient to cover cost of rebidding in the event the bidder defaults
May not exceed 5% of amount of bid
Acceptance, Rejection and Award of Bids

“Lowest and Best Bidder”

May adopt “Lowest Responsive and Responsible Bidder”

(§9.312C)

May reject all bids
Items Required to Process a Contract

Findings for Recovery
Bid Bond (Permissive)
Performance Bond (Selective)
Surety Guaranty / Performance (Construction)
Additional Items Suggested to Process a Contract

Non-Collusion Affidavit
Non-Discrimination and EEO Affidavit
Other Methods of Purchasing

Community Rehabilitation Programs (Mandatory)
State Term Contracts and Schedules
ODOT Contracts (Need Resolution)
GSA Contracts (Limited Availability)
Cooperative Contracts of other governmental entities
Contracts

Contracts in General
Construction Contracts
County Administrator given Contract Authority
Other Procedures

Real Estate Lease Procedures
Sale of Real Estate and Personal Property Credit
Cards Procurement Cards
Electronic Signatures and Records
Procurement Cards (P-Cards)

BCC and Auditor must be agreeable
A RFP must be issued or under ORC §9.48 a Cooperative Contract
Easiest way to pay for small purchases
Saves on the number of checks (warrants) issued
Procurement Cards (P-Cards)

• BCC in conjunction with Auditor must adopt a policy by Resolution
  – Limit use of card
  – Limit number of transactions
  – Limit by supplier
  – Limit daily or monthly amount
  – Limit types of goods
Presenters

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