



Purchasing Policy Surplus Policy Updates

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Scope

- Approval of all contracts is the responsibility of the Board of County Commissioners, except when designated otherwise
 - BCC signed all contracts
- All contract must go before the BCC for an approved resolution
- All funds must be lawfully appropriated for a proper public purpose prior to expenditure



Ethics

New Language – Unlawful Interest in Public Contracts Prohibited (ORC 291.42) State Law prohibits:

1. Don't use your position to help approve a public contract if you, your family, or your business partners could benefit from it.
2. Don't use your influence to invest public money in something that benefits you, your family, or your business associates.
3. You can't take a paid job related to a public contract you helped approve — during your time in office or for one year afterward — unless the contract was awarded through a fair, competitive bidding process.
4. Don't have a financial interest in a public contract made by your government office.
5. Don't profit from a public contract that wasn't competitively bid (when it should have been by law) if it's worth more than \$150.



Ethics


Public Contract is defined as:

1. The purchase or acquisition, or a contract for the purchase or acquisition, of property or services by or for the use of the state, any political subdivision of the state or any instrumentality of the state or a political subdivision; or
2. A contract for the design, construction, alteration, repair, or maintenance of any public property.



Inclusion Statement

The BCC recognizes the community benefit of creating equal opportunity for all vendors to participate in the County procurement process. The advancement of economic inclusion improves equity, economic mobility, and quality of life for all Lucas County residents. Accordingly, the Commissioners encourage racial equity training among all community partners, grantees, vendors, and contractors. The Commissioners also encourage all agencies to make a good faith effort to utilize local, diverse suppliers in all phases of procurement and contracting including multiple quote process, and purchase orders.

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- Non-Discrimination / Equal Opportunity
 - Our vendors will not discriminate
 - Public Records Policy
 - Defined public record laws for bids and proposals
 - Authority
 - Defined ORC referenced in policy



Purchasing Tiers

- **Tier 1** purchases are from \$0.01 - \$999.99 – No quote required.
 - **Tier 2** purchases are from \$1,000.00 - \$7,499.99 – One quote is required.
 - **Tier 3** purchases are from \$7,500.00 - **\$77,249.99** – Three quotes are required.
 - **Tier 4** purchases are from **\$77,250.00** and greater – There must be a Competitive Bid. This will increase to \$79,567.50 for calendar year 2026.
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- No change to tier's 1 and 2
 - Tier 3 changed to \$7500 - \$77,249.99 (competitive bidding threshold)
 - Tier 4 - \$77,250 or greater must competitively bid.
 - The competitive bidding threshold will increase 3% January 1 of every year



Vehicles

- Purchase, lease, transfer or disposal of any county vehicle must go through Support Services.
- Purchase, lease, transfer, disposal vehicle form
- Support Services webpage



Types of Requisitions

- Requisition from a Quote
- Purchase Orders with contract and resolutions
- Blanket Purchase Orders
 - Must have BCC approval
- Contract Purchase Agreements (CPA's)
 - Tracking tool – does not encumber the funds
- Then and Now (TAN)
 - Will be reviewed weekly delaying a Purchase Order being issued
- Obtaining Informal Quotes
 - Request for Quote Form

Request for Quotes Form

ATTACHMENT E

CAS COUNTY REQUEST FOR QUOTE

County Agency Name: _____

Agency Contact: _____

Email: _____ Telephone: _____

The County agency listed above is soliciting quotes for the purchase of (attach any additional specifications if needed):

Vendor Name: _____

Vendor Address: _____

Vendor Email: _____ Telephone: _____

Is Vendor Located within a 50-mile Radius of Lucas County: Yes No

GENERAL CONDITIONS

The County agency will accept quotes no later than 2 p.m. on _____
or any time prior thereto.

Quotes should be emailed as an attachment to _____

Quotes received after that time will be considered late and will not be accepted.

The County agency reserves the right to reject any and all Quotations. The County Agency further reserves the right to seek new quotes when such a procedure is reasonably in the best interest of the County agency to do so. Providing a quote does not guarantee an award of purchase order.

If a local vendor (as defined in the Lucas County Local Preference Policy) within a 50-mile radius of Lucas County is within 2% of the lowest quote received, the County agency may offer the local vendor the opportunity to match the lowest quote received.

Lucas County's purchase terms and conditions supersede any acknowledgements or other vendor terms and conditions. DO NOT quote if your company cannot abide by this Policy.

PAYMENT

Full payment will be made upon receipt, inspection and acceptance of a complete unit(s). No down or partial down payments will be made.

Lucas County does not pay sales tax. Do not compute sales tax into your final price.



Competitive Bidding

For all levels of purchases, each agency must seek competition to the maximum extent possible. Without competition, there is no certainty that the price and service obtained are the best available. All purchases greater than or equal to \$77,250.00 must be competitively bid, with the exceptions noted in ORC 307.86

Throughout the competitive process the BCC, to the greatest extent possible, requires all agencies and Elected Officials' offices to work with Support Services and the Lucas County Prosecutor's Office to ensure that the purchasing integrity of the County is not compromised. This will assure the BCC that the requirements of the ORC and this Policy are followed.



Joint Purchasing Programs

- Under the authority of ORC 125.04, agencies can purchase supplies and services from State Term Schedules (STS) and Multiple Award Contracts (MAC).
- Under ORC 9.48, counties are allowed to make purchases for supplies and services from a joint purchasing program operated by or through a national or state association of political subdivisions that the County can join (e.g., OMNIA Partners, Sourcewell, Equalis, or other Cooperatives) and participation in contract offerings from the federal government that are available to a political subdivision including, but not limited to, contract offerings from the General Services Administration (GSA); they may also purchase from cooperative contracts that have been competitively bid by another political subdivision
- A resolution is required



Formal Bids and Proposals

- Invitation to Bid (ITB)
 - Firm and fixed contracts
 - Do not have authority to negotiate terms, conditions or specifications
- Request for Proposals (RFP)
 - Requirements of Scope of Work are outlined in Policy
 - Ability to negotiate best price, finalize contract terms and conditions and establish final project plan
 - Evaluation criteria
- Request for Qualifications (RFQ)
 - Use to select professional design services and professional services exempt from competitive bidding as outlined in ORC 307.86
- Request for Information (RFI)
 - Informational gathering only
 - No contract can be directly awarded as a result of an RFI



Legal Notices

Notice shall be published once a week for not less than two consecutive weeks preceding the day of the opening of bids for any purchase, lease, lease with option or agreement to purchase, or construction contract in excess of the amount specified in section 9.17 of the Revised Code, using at least one of the following methods:

- Publication in the print or digital edition of a newspaper of general circulation in the county.
- Publication on the official public notice website established under O.R.C. 125.182.
- Publication on the website and social media account of the county.

In addition, the notice must be posted on a bulletin board at the office of the commissioners or in another suitable place. The notice must be posted for at least two weeks prior to the bid opening (ORC 307.87).



Contracts

- All contracts can only be signed by the Board of County Commissioners, this requires a resolution
- **Findings for Recovery (ORC 9.24)**
 - Prohibits any county from awarding a contract for goods, services, or construction, paid for in whole or in part with state funds, to any person against whom a finding for recovery has been issued by the State Auditor, if that finding is unresolved.
 - Before awarding a contract for goods, services or construction, paid for in whole or part with state funds, the county must verify that the person does not appear in a database maintained by the State Auditor. Findings for recovery may be found on the State Auditor's website at <https://ohioauditor.gov/findings.html> .



Disposition of Surplus Property

- Threshold for items that must be sold on GovDeals changed from \$2,500 to \$5,000
- Resolution to donate to a non-profit no longer requires public notice or resolution
 - By donating to a nonprofit, the nonprofit must be a 501(a) or 501(c)(3) organization located in Ohio, and the nonprofit must submit evidence of its eligibility upon approval from the County/Deputy County Administrator and Support Services.



Questions?