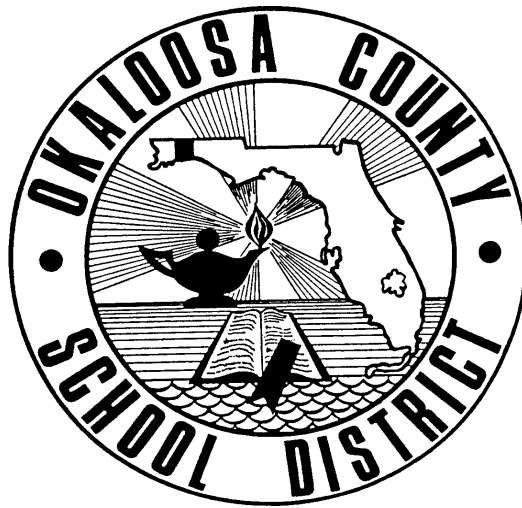


PURCHASING DEPARTMENT

HOW TO DO BUSINESS WITH THE OKALOOSA COUNTY SCHOOL DISTRICT



Scan QR Code
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additional information on
Vendor Registration and
Vendor Fingerprints



FOREWORD

The Purchasing Department hopes this guide will help vendors understand “How to Do Business with the District” and become acquainted with the School Board’s policies and procedures. It is intended to promote goodwill with the vendor community and to serve as a general guide for doing business with the district. If you have questions, which are not answered in this booklet, do not hesitate to contact this department.

Vince Windham, CPPB, NIGP-CPP
Program Director of Purchasing

OBTAINING INFORMATION

Our Web Site offers a wealth of information and is available 24 hours per day, 7 days per week, at your convenience. Visit our Web site to obtain:

- Vendor Applications & Other Vendor Information
- Current Bid and Award information
- Policies and Procedures
- Public Notices
- Purchasing Staff Information

Visit our Web site at www.okaloosa.k12.fl.us/finance/purchasing.aspx. You can also reach our web site through the District web site at www.okaloosaschools.com by clicking on “Departments” and then “Finance”. If you do not have Internet access, this same information is also available by calling our Bid Information Hotline at: (850) 833-7668.

LOCATIONS & BUSINESS HOURS

The Purchasing Department office is located in the Central Administration Complex, 202A Highway 85 North, Niceville, FL. 32548. This is also our mailing address. Our main telephone is (850) 833-7668. Normal business hours are from 7:30 a.m. to 4:00 p.m., Monday through Friday. Impromptu visits by sales representatives are welcome, but it is recommended, whenever possible, to schedule appointments to assure the appropriate staff will be available to meet with you.

RESPONSIBILITIES

The Purchasing Department provides centralized purchasing support for all schools and departments. This department processes all requests for equipment, supplies and services. Buyers are assigned specific commodity areas for which they are responsible, in order to provide the best possible service to the District. You may obtain information about each buyer’s specific categories by contacting our office.

ACCEPTANCE OF GIFTS

Employees are prohibited from accepting gifts or gratuities, which might potentially influence their decision to purchase from a specific vendor, with the exception of promotional items bearing company logos or advertising.

VENDOR REGISTRATION

To do business with the Okaloosa County School Board, vendors must register by entering the [PURCHASING WEBSITE](#) and choosing the “Vendor Information” link on the web site. After clicking on the “Vendor Information” link, click on the “Vendor Registration” link. This web page provides information on how to register for downloading our formal solicitations through the Florida Purchasing Group Bid System (BIDNET). The District posts Invitations to Bid, Request for Proposals, and other formal solicitations through the Florida Purchasing Group

Bid System (BIDNET), Okaloosa County School Board's bid management partner. Registration allows vendors to download and print solicitations at no charge to the vendor. All registered users also receive automatic bid matching email notifications from purchasing group members. The system also includes solicitations from several other area School Districts and Government entities associated with the Florida Purchasing Group Bid System (BIDNET). To receive a purchase order from the Okaloosa County School Board, all vendors are required to complete an Okaloosa County School Board Vendor Application form. The vendor application and instructions for registering are also included on the Purchasing web site. Completing and returning the vendor application allows us to set up your company as an active vendor so your company is able to receive purchase orders from the district. Vendor applications are held on file and entered when a school or department requests to use a vendor.

ANTI-COMPETITIVE PRACTICES

Vendors are hereby notified that the Purchasing Department cooperates fully with the Florida Attorneys General to monitor all procurement activities for anti-competitive practices, such as price fixing, bid rigging, collusion, etc., which violate State and Federal laws pertaining to these matters.

SITE VISITATIONS

Vendors may visit school Principals after completion and approval of MIS 5253 – Vendor Request to Contact Principals. This form is available on the District website under the “Documents & Policies” link.

PURCHASING GUIDELINES – BIDS & QUOTATIONS

- **\$ 10,000.00 - \$ 50,000.00:** Informal Requests for Quotations (RFQ) shall be requested in writing from three (3) or more sources for any authorized purchase of any item or group of similar items or contract for services unless otherwise exempted in Florida State Board of Education Administrative Rule 6A-1.012. Specifications are developed and quotes are then solicited. After quotes are evaluated an official purchase order is then signed by the Program Director of Purchasing and issued to the successful vendor.
- **Exceeding \$ 50,000.00 :** Formal Invitations to Bid (ITB) or Request for proposal (RFP) shall be requested from three (3) or more sources for any authorized purchase of any item or group of similar items or contract for services exceeding fifty thousand dollars (\$50,000.00) unless otherwise exempted in Florida State Board of Education Administrative Rule 6A-1.012. Specifications are developed and bids/proposals are then solicited through the Florida Purchasing Group Bid System (BIDNET). Sealed bids/proposals are received, logged in and opened at a specified time and location. All who wish to attend the public openings are cordially invited. Bids/proposals are then tabulated and reviewed by a committee. After tabulation and review, a “Notice of Intent to Award” is posted on the public notice board in the Purchasing Office on the date and time specified in the bid/proposal. The tabulation is also posted on the Purchasing web site and Florida Purchasing Group Bid System (BIDNET). The ITB/RFP recommendation is submitted to the Okaloosa County School Board for award or for approval to negotiate with the highest ranked proposer (RFP). A formal purchase order is prepared and issued after award is finalized and approved by the Okaloosa County School Board.

BIDS AND RFP'S

It is Okaloosa County School Board Policy to solicit competitive sealed Bids (ITB) or Proposals (RFP) for purchases which exceed \$50,000 unless exempted in Florida State Board of Education Administrative Rule 6A-1.012. The following procedures are followed in the sealed bid/proposal process:

1. Notice is made to prospective vendors through the Florida Purchasing Group Bid System, Okaloosa County School Board's bid management partner. To download bids/proposals through this system, vendors must register by entering the [PURCHASING WEBSITE](#) and completing the vendor registration information. Registration is required for all vendors who wish to view bid/proposal documents, amendments and awards through the online bid system.
2. Sealed bids/proposals are received, logged in and opened at a specified time and location. All who wish to attend the public openings are cordially invited. Bids/proposals are then tabulated and reviewed by a committee.
3. After tabulation and review, a "Notice of Intent to Award" is posted on the public notice board in the Purchasing Office. The bid/proposal tabulation is also posted on the Florida Purchasing Group Bid System and the Purchasing web site.
4. The ITB/RFP recommendation is submitted to the Okaloosa County School Board for award or for approval to negotiate with the highest ranked proposer (RFP).
5. A formal purchase order is prepared and issued after award is finalized and approved by the Okaloosa County School Board.

SUBMITTING BIDS

Sealed bids/proposals may be returned by U.S. mail, private courier service, or hand delivered to the Purchasing Department at the address on the bid/proposal Invitation Form. All bids/proposals must be enclosed in a sealed envelope with the return address label provided with your packet affixed to the outside of the envelope listing the Bid/Proposal Name, Bid/Proposal Number, Bid/Proposal due date and the name of the vendor submitting the bid/proposal. Once received, bids/proposals are logged in and time and date stamped to document when they were received. LATE BIDS/PROPOSALS WILL NOT BE ACCEPTED. Bids/proposals requiring bonds are to be submitted in two (2) separate sealed envelopes. The bid/proposal must be sealed in one envelope and the bond in a second envelope attached to the sealed bid/proposal envelope. Since ALL bonds must be reviewed prior to opening your sealed bid/proposal, enclosing the bond with the sealed bid/proposal in the same envelope will result in your bid/proposal being disqualified and left unopened. SEALED BIDS/PROPOSALS SENT BY EMAIL OR FAX WILL NOT BE CONSIDERED, however these are acceptable methods for informal quotations.

Please Note: The Purchasing Department is not responsible for the reliability or performance of the U.S. Postal Service, private carriers, or the Districts interoffice mail delivery system. Some carriers that guarantee "next day delivery" only guarantee the package to reach its destination by the end of the business day which is too late in most cases, as bid/proposals are generally opened at 2:00 PM CT. Be aware of this when relying on a last minute delivery of your Bid/Proposal package. It is SOLELY THE VENDOR'S RESPONSIBILITY to ensure that its bid/proposal is received in the Purchasing Department by the deadline specified in the bid/proposal document. You may call us at any time to confirm that we have received your bid/proposal.

PUBLIC BID OPENINGS

All bids or proposals shall be opened publicly in the presence of at least three (3) School Board employees. The Program Director of Purchasing or designee shall acknowledge receipt of the bids or proposals by reading aloud the names of the bidders, unless the bid is a competitive solicitation for construction or repairs on a building, then the name of each bidder and price submitted shall be read at a public bid opening per F.S. 255.0518. The Program Director of Purchasing shall request further evaluation of the bids or proposals if necessary, and after such evaluation make a recommendation of award to the School Board. Those employees preparing evaluations or tabulations shall sign them for future reference. Bids or proposals received after the designated time shall not be considered.

POSTING OF AWARD RECOMMENDATIONS

Once bids/proposals are evaluated and the Purchasing Department receives a recommendation for award from the requester, a Notice of Intent to Award will be posted for review by interested parties in the Purchasing Office (Official Posting Location). Bidders are invited to visit our location to obtain this information. As a convenience, the notice is also posted to the Purchasing web site on the "Notice of Recommended Awards" web page and on the Florida Purchasing Group Bid System (BIDNET).

BID PROTESTS

A vendor who wishes to protest the recommended award of a bid/proposal may do so by following procedures set forth in School Board Policy Chp 2-17A(13a-13d) and Section 120.57(3), Florida Statutes. *Only those vendors who submit a bid are eligible to protest the award of a bid.*

AWARD POLICY

In acceptance of responses to invitations to bid (ITB), the Board may award contracts on the basis of the lowest and best bid from a responsive and responsible bidder which meets specifications with consideration being given to the specific quality of the product, conformity to the specifications, suitability to school needs, delivery terms, and service and past performance of the vendor. For identical, qualified bids, the recommendation shall be made for a local vendor or, if there is none, by casting lots. Samples of products may be requested when practical. The School Board shall reserve the right to reject any or all bids and may waive any minor irregularity or technicality in bids received, that in its judgment will be in the best interest of the School Board.

In acceptance of responses to requests for proposals (RFP), the Board may award contracts to one or more responsive, responsible proposers in accordance with the selection criteria published in the request for proposal and reserves the right to further negotiate contract terms with selected vendor(s). The School Board shall reserve the right to reject any or all proposals and may waive any minor irregularity or technicality in proposals received, that in its judgment will be in the best interest of the School Board.

METHODS OF PURCHASE

Purchase Orders

The traditional and most commonly used document issued either by the district's purchasing department or by the individual schools. To differentiate between the district's purchase order form and all others, look for a document listing the Purchasing Department's name and address at the top as well as the school district emblem.

NOTE: Vendors are not authorized to ship materials or provide services before obtaining a signed purchase order from this department. Failure to obtain a purchase order in advance may result in the vendor being denied payment.

Purchasing Cards

Certain employees are authorized to use a purchasing card (Visa™ card) to purchase materials allowed per the District Purchasing Card Policy. Transactions of this type are tax exempt and will always be made for official School Board use. The district's sales tax exemption number is imprinted on the face of the card.

Florida State Contracts

State Contracts are issued by the State of Florida, Department of Management Services, Division of Purchasing for use by ALL Florida State agencies and political subdivisions in lieu of seeking competitive bids of their own. The district receives and gives consideration to the prices available from such contracts whenever it is determined to be in its best interest to do so.

State Purchasing Alternate Source Contracts

Alternate Source Contracts are also issued by the State of Florida, Department of Management Services, Division of State Purchasing for use by ALL Florida State agencies and political subdivisions in lieu of seeking competitive bids of their own. The district receives and gives consideration to the prices available from such contracts whenever it is determined to be in its best interest to do so.

Bid "Piggy-Backing" or "Tag On Bids"

In lieu of seeking competitive bids, and by mutual consent of the District and the vendor, the District shall have the option to purchase under current contracts from other governmental agencies or school districts at the unit prices offered in their bid documents, if such purchase prices are to the economic advantage of the District.

PAYMENTS

The original invoice, referencing the purchase order number, should be mailed directly to:

THE SCHOOL DISTRICT OF OKALOOSA COUNTY
CENTRAL ADMINISTRATION COMPLEX
C/O ACCOUNTS PAYABLE
202A HIGHWAY 85 NORTH
NICEVILLE, FLORIDA 32578
PHONE: (850) 833-6320
EMAIL: ACCOUNTS.PAYABLE@OKALOOSASCHOOLS.COM

TAX EXEMPTION STATUS

The Okaloosa County School Board is a government agency and is exempt from certain taxes. Our Sale Tax Exemption Number is preprinted on every purchase order. A copy of our Sale Tax Exemption Certificate is also available by calling the Purchasing Department, (850) 833-7668.