



**MESCAL J-6
FIRE DISTRICT**

**STANDARD OPERATING
POLICY # 092**

BIDDING FOR GOODS & SERVICES

I. PURPOSE

The purpose of this policy is to: 1) establish a protocol for the purchase of goods and services that does not encumber or unnecessarily delay personnel from performing their duties in a safe and legal manner, and 2) ensure the use of the District's limited financial resources is counter-balanced with the needs of our volunteer staff and governing members.

II. SCOPE

This policy applies to all purchases made by District personnel.

III. POLICY

It shall be the policy of the Mescal-J6 Fire District to obtain bids for designated goods and services, with the goal of obtaining the best value for the money.

IV. PROCEDURES

GOODS

< \$100.00 (not for vehicles or real estate)

The purchase of a disposable item costing less than \$100.00 may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. Examples include food, cleaning supplies, office supplies, toiletries. **EXEMPT**

\$100.00 to \$1000.00 (not for vehicles or real estate)

Purchases costing \$100.00 to \$1000.00 require the purchaser to compare prices of at least 2 reasonably similar products. Such documentation shall consist of either print-outs of online quotes, copies of newspaper ads, or official quotes (email and fax are acceptable provided the vendor's name and phone # are legible). All related costs (delivery, shipping, sales tax, maintenance plans, training) must be included when calculating the price. Documentation of the 2 comparisons must be provided to the Treasurer to be filed with the purchase invoice or receipt. Copies must also be filed with the Secretary as correspondence. **2 DOCUMENTS**

> \$1000.00 (not for vehicles or real estate)

Purchases over \$1000.00 will require the purchaser to obtain at least 2 written quotes for the same product specifications. Such documentation shall consist of either print-outs of online quotes, or official quotes (email and fax are acceptable provided the vendor's name and phone # are legible). All related costs (delivery, shipping, sales tax, maintenance plans, training) must be included in the quote. Copies of both quotes must be provided to the Treasurer to be filed with the purchase invoice or receipt. Copies must also be filed with the Secretary as correspondence. **2 WRITTEN QUOTES**



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VEHICLES

Any purchase of a new or used vehicle will require the use of a formal bidding process and use of a Fire Apparatus bid solicitation form. **FORMAL BID**

REAL ESTATE (LAND and/or STRUCTURES)

The District may not purchase any real estate for more than \$2000.00 without completion of a property valuation comparison. Such comparison shall include either a written appraisal from a licensed or certified appraiser, or no less than 2 written Statements of Value from licensed realtors or lenders who are not affiliated with the same agency or broker. Any documentation of property valuation may not be more than 30 days old at the time it is submitted to the Governing Board. The Treasurer will file copies of property valuation documentation with the purchase invoice or receipt. Copies must also be filed with the Secretary as correspondence. **WRITTEN DOCUMENTS**

SERVICES

ADS & PUBLIC NOTICES

It is understood that Arizona Revised Statutes often requires the District to publish ads and notices in the local newspaper, even though publication in another newspaper may be cheaper. Therefore, newspaper ads and public notices may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. **EXEMPT**

LEGAL SERVICES

It is understood that Arizona Revised Statutes encourage the use of legal services utilizing County and State agencies. Therefore such services, when available to the District, may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. **EXEMPT**

VEHICLE REPAIR & MAINTENANCE

It is understood that the timing and nature of vehicle repair and maintenance, as well as scheduling issues on the part of District personnel and qualified vendors, requires flexibility in when and where such services are performed. Therefore vehicle maintenance and repair may be purchased, contracted, or utilized without need for multiple quotes or cost comparisons. This covers the radios inside the vehicles, as well as pumps, generators, and other tools stored in the vehicles. **EXEMPT**

UTILITIES

Utility services (ie telephone, electric, water, internet, natural gas, propane, and sewer) may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. **EXEMPT**

WARRANTY OR DISCOUNTED SERVICES

Services that may be covered for free or at partial discount under a warranty program, or that are offered at a reduced cost due to a coupon or gift certificate, may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. **EXEMPT**

PROFESSIONAL SERVICES

In selecting Professional Services for the District, the Board will consider the factors that it determines relevant in determining what is in the best interest of the Fire District.



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OPERATIONAL SERVICES (less than \$100.00)

Other operational services expected to cost \$100.00 or less *per occurrence* may be purchased, contracted, or utilized without need for any written quotes or cost comparisons. Examples include printing, shipping, and exterminator. **EXEMPT**

OTHER OPERATIONAL SERVICES (\$100.00- \$2500.00)

Any other operational service costing \$100.00 to \$2500.00 shall require at least 2 written quotes. Such documentation shall consist of either print-outs of online quotes, or official quotes (email and fax are acceptable provided the vendor's name and phone # are legible). All related costs (meeting attendance, delivery, shipping, sales tax, maintenance plans, training) must be included in the quote. Copies of both quotes must be provided to the Treasurer to be filed with the purchase invoice or receipt. Copies must also be filed with the Secretary as correspondence. **2 WRITTEN QUOTES**

OTHER OPERATIONAL SERVICES (more than \$2500.00)

All other operational services shall require at least 2 written bids and use of an Operational Services bid solicitation form. **2 WRITTEN BIDS**

PRE-AUTHORIZED SPENDING LIMITS & BUDGETS

No part of this policy shall be construed as negating any spending authorities established in other District policies or overriding any budgetary limits adopted by the Governing Board.

SPECIFICATIONS

All quotes must be based on the same written specifications without name brands or models. The only exception to this rule will be special conditions for receiving grant funding or designated donation monies.

GRANT FUNDING REQUIREMENTS

Additional steps may be required for the purchase of a good or service when grant funds are used. This may include a more detailed or restrictive quote or bid process. It will be the responsibility of the grant administrator or project manager to 1) identify any bidding requirements that exceed the District's general bidding policy, and 2) advise the Board and Command Staff of the additional requirements.

DESIGNATED DONATIONS

Nothing in this policy should preclude accepting a monetary donation to be used for the purchase of a specific brand or model if it is the donor's written preference that the money be used in that manner and that to do so would not be in violation of any other District policy or Arizona Revised Statute.

RECEIPT OF QUOTES

Quotes received by the District, whether solicited or unsolicited, are to be considered confidential correspondence. The information included in a quote is not to be used for non-District purposes nor divulged in any format to anyone not connected with the District except as required by law. Violation of this provision may be grounds for being removed from the District roster or Governing Board.



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ACCEPTANCE OF LOW QUOTE

Special circumstances must arise to reject the low quote. This may include differences in delivery or performance time that could negatively impact service to the community, unsatisfactory level of service in the past, unresolved problems with the same company related to another purchase or service, and a substantial conflict of interest. The reason for rejection of a low quote must be communicated to the Board in writing.

NOTICE OF BIDS

Requests and solicitations for Fire Apparatus or Professional Services bids shall be posted at Station 1 and Quick Pic as well as sent to vendors of interest.

RECEIPT OF BIDS

Bids received by the District, whether solicited or unsolicited, are to be considered confidential correspondence. The information included in a bid is not to be used for non-District purposes nor divulged in any format to anyone not connected with the District except as required by law. Violation of this provision may be grounds for being removed from the District roster or Governing Board.

ACCEPTANCE OF BIDS

Until further notice, the District shall be governed by this policy as well as the bidding process outlined in the January 2009 Arizona Fire District Association handbook. If none of the bids received by the District are acceptable, the Governing Board may reject all bids, change the specifications as necessary, and re-advertise for bids.

Approved by the Mescal-J6 Fire District Governing Board on May 31, 2017 Replaces October 4, 2010