

**SECTION 2: INTRODUCTION**

**2.0 Purpose**

- 2.0.1 The purpose of this Manual, which is an Administrative Code adopted by the Board, is to assist County employees regarding the procurement policies and procedures of Lee County, Florida.
- 2.0.2 The adoption of this Manual, and the approval of any subsequent revisions to such, by the Board, shall authorize the policies and procedures contained herein for official use in County business.
- 2.0.3 The Board has authorized the County Manager or, in his/her absence, the Deputy County Manager, or Assistant County Managers to approve procedural revisions to this Manual.

**2.1 Scope**

- 2.1.1 The scope of this Manual, and the policies and procedures contained herein, govern all departments and divisions under the jurisdiction of the Board, as well as all purchasing transactions, which are paid for directly from County and grant funds under the control of the Board. The contents of this Manual preempt all previously existing purchasing manuals, policies and procedures.

**2.2 Distribution**

- 2.2.1 This Manual will be made available, electronically via Procurement's Web Page, to all County employees involved in the procurement process. Procurement will be responsible for maintaining the official adopted version of this Manual online and for the continual updating this Manual as necessary, including any subsequent revisions on the web page.

**2.3 Implementation**

- 2.3.1 It shall be the responsibility of the County Manager or designee, through Procurement, headed by the Procurement Director, to implement and enforce the policies and procedures set forth in this Manual.
- 2.3.2 The Procurement Director, as head of Procurement, shall exercise functional authority over the County procurement process for the purpose of implementing and enforcing these policies and procedures on a county wide basis, as well as in Procurement for its role in the process.

- 2.3.3 Each department and division director shall be responsible for implementing and enforcing these policies and procedures within their respective jurisdictions.
- 2.3.4 A violation of any of the policies and procedures in this Manual may be grounds for disciplinary action and also may result in the County's refusal to pay for any improperly ordered goods or services.
- 2.3.5 Only the Board shall have the authority to waive or over-ride the policies contained in this Manual. In such cases, which are in the Board's opinion exceptional, they may issue specific directions that a particular case be handled in a manner different than required by this Manual.

**2.4 Revisions**

- 2.4.1 This Manual is to serve as a permanent, up-to-date guide to County procurement policies and procedures. Therefore, as necessary changes are made in policies and procedures, appropriate revisions will be made to this Manual. Procurement shall be responsible for the accurate maintenance of the Manual and for assisting all appropriate parties in maintaining an up-to-date Manual.

**2.5 Recommendation**

- 2.5.1 County employees are encouraged to make recommendations on sections of the Manual that, due to changing conditions may need revisions. They are also encouraged to make recommendations on new subjects not presently included in the Manual which they feel are necessary.
- 2.5.2 Any such recommendations should be submitted through appropriate organizational channels to the County Manager or designee for review and consideration.
- 2.5.3 The County Manager or designee shall be responsible for any proposed revisions of this manual.

**2.6 Complaint Procedure**

- 2.6.1 If any department or division has a complaint, about any aspect of the procurement function, they are to submit the complaint, in memo form, via the County's e-mail system and/or on a vendor complaint form to the Procurement Director.
- 2.6.2 Upon receipt of a complaint it will be logged in by Procurement as follows:
- Date received
  - Person/department issuing the complaint
  - Nature of the complaint
  - Date of complaint disposition
- 2.6.3 If the complaint involves a purchase order issued by Procurement, the Procurement Director will assign the complaint to the buyer assigned to issue the order in question.
- 2.6.4 The buyer will contact the vendor in an attempt to resolve the issue in question.
- 2.6.5 Upon satisfactory resolution of the complaint the buyer will report back to the Procurement Director with the appropriate details.
- 2.6.6 The Procurement Director or the buyer will then report back the findings/solution to the department originating the complaint
- 2.6.7 If the complaint involves a purchase order that was a department to handle, the memo or vendor complaint form will be filed for informational purposes only. It is the requisitioner's responsibility to resolve the complaint to the County's satisfaction.

**2.7 Training**

- 2.7.1 All County employees who are responsible for implementing the procurement process (entering REQUISITIONS) within their department/division must attend mandatory classes. New employees must attend mandatory training classes prior to the issuance of a One World® sign on.