

Attachment A to Resolution No. 36-17
Tuolumne County Transportation Council (TCTA)
Purchasing Goods and/or Services
Quotation/Bidding Guidelines

1. \$2,000 or less:

- a) No quotes required.
- b) Contact two or three vendors and ask for pricing on the item. Items \$1,000 or less may be approved by the Senior Administrative Analyst. Items over \$1,000 require the Executive Director's approval.
- c) Secure through a Purchase Order or credit card.

2. \$2,001 to \$5,000:

- a) Informal quotes must be obtained from a minimum of three vendors unless the product is so specialized that obtaining three quotes is not feasible.
- b) A "Purchasing Quotation Form" or comparable document should be completed and forwarded to the Executive Director with your vendor recommendation.
- c) The item should not be secured until approved by the Executive Director.
- d) Secure through a Purchase Order or credit card.

3. \$5,001 to \$10,000:

- a) Written quotes must be obtained from a minimum of three vendors unless the product is so specialized that obtaining three quotes is not feasible.
- b) Quotes must be attached to and summarized on the "Purchasing Quotation Form" or comparable document and forwarded to the Executive Director with your vendor recommendation.
- c) The item should not be secured until approved by the Executive Director. If not included in the adopted budget, TCTC approval also required.
- d) Secure through a Purchase Order or credit card.

4. More than \$10,000:

- a) Competitive bids must be obtained through the formal Request for Proposals (RFP) or bid process.
- b) RFP or Bid packages must be approved as to form by the Executive Director prior to issuance.
- c) Formal proposals or bids must be attached to and summarized on the "Purchasing Quotation Form" or comparable document and forwarded to the Executive Director with your recommendation. Executive Director and TCTC approval required.
- d) Secure through a Purchase Order or credit card.

Authorization Levels:

Authorization levels are intended to insure prudent purchasing authority without undue limitations.

\$1,000 or less	—	TCTC Senior Administrative Analyst
\$1,001 to \$5,000	-	TCTC Executive Director
\$5,001 to \$10,000	-	TCTC Executive Director and TCTC Adopted Budget
More than \$10,000	-	Requires TCTC Approval or delegated authority to the Executive Director approved by the TCTC at a regular meeting.

General Rules

1. Local vendors should *always* be given the opportunity to submit quotes/bids on goods and/or services. *“Local vendor” means a vendor whose principal place of business is within Tuolumne County.*
2. Goods should be purchased from vendors which offer the lowest price on items which meet specifications. Local vendors shall be given a 5% price preference as per County Ordinance Code Section 2.24.050. The preference percentage shall be based on the lowest bid or price quoted by the supplier.
3. Requests for Proposals (RFPs) and Requests for Qualifications (RFQs) should only be used when dealing with products which are heavily service oriented. If RFPs or RFQs are being used, a rating system shall be utilized to evaluate and select from amongst proposals. Price is but one factor in such ratings.
4. Services are best secured through an agreement as opposed to a purchase order or credit card. If something other than an agreement is desired, the matter should be reviewed with the Executive Director who may in turn confer with Legal Counsel.
5. All RFP’s and Bid packages are to be reviewed with the Executive Director before being released. The Executive Director will confer with Legal Counsel on more complicated packages before approving them for release. If a draft agreement is to be attached to an RFP or Bid package, the draft agreement itself should be reviewed with Legal Counsel before the release of the RFP or Bid package.
6. Orders or verbal commitments to vendors shall not be made until purchase orders or agreements have been approved by the Executive Director. If an agreement is to be used to secure the purchase, commitments should not be made until the agreement has been approved by both the Executive Director and Legal Counsel.
7. Information Technology (IT) purchases shall be coordinated through the County’s IT Division.
8. The TCTC Senior Administrative Analyst shall be the lead on all purchases and agreements/contracts that require a purchase order or request for bids, proposals or qualifications.
9. Small purchases under \$1,000 that may be purchased with a credit card only require consultation and approval from the Senior Administrative Analyst.
10. Small purchases under \$2,000 that may be purchased with a credit card only require consultation and approval from the Executive Director.

Tuolumne County Transportation Council
PURCHASING QUOTATION FORM

Preparer: _____

General Description of Item: _____

Quote/Bid No. 1

Firm: _____

Contact Person (name, phone number, email address): _____

Quote: _____

Quote/Bid No. 2

Firm: _____

Contact Person (name, phone number, email address): _____

Quote: _____

Quote/Bid No. 3

Firm: _____

Contact Person (name, phone number, email address): _____

Quote: _____

Award Recommendation: (provide justification if anything other than low quote)

(Attach written quotes from vendors if over \$5,000)