City of Jacksonville Beach

Briefing Notice

11 North Third Street
Jacksonville Beach, Florida

City Council

Monday, September 8, 2025 **5:30 PM** **City Hall 1st Floor Conference Room**

City Manager Mike Staffopoulos will conduct a Council Briefing to update the City Council about ongoing items in the City. The Briefing will include, but not be limited to, the following topics:

A. Beach Body Towing

B. Golf Course Bylaws and Rate Resolution

C. Live Local Act Expansion Review

D. Purchasing Ordinance and Manual Update Project

E. Miscellaneous City Manager's Items

F. Committee Assignment Report

G. Future Briefing Topics

Council Members in attendance may include:

Mayor:	Christine Hoffman		
Council Members:	Sandy Golding	Bill Horn	Dan Janson
	Bruce Wouters	Greg Sutton	John Wagner

Please note: Council Members in attendance may vary according to their schedules.

No public comments are taken at the City Manager's Council Briefing.

If you are a person with a disability who needs an accommodation to participate in a meeting, you are entitled, at no cost to you, to the provision of certain assistance. Please contact the ADA Coordinator by phone 904-712-6297 or submit an Accommodation Request to the ADA Coordinator as far in advance of the meeting as possible; preferably 7 days but no less than 2 business days, before the meeting. If you are hearing or voice impaired, please call Florida Relay at 711 for assistance.

CITY COUNCIL BRIEFING TOPIC	
TO:	Michael J. Staffopoulos, City Manager
FROM:	Gene Paul Smith, Chief of Police
DATE:	September 8, 2025
SUBJECT:	Beach Body Wrecker Call List

BACKGROUND

In January, Ms. Melanie A. Parsons, owner of Beach Body Towing Company, contacted me in reference to her business. She advised that the property where her business is located (928 7th Avenue, South) is being sold by her family. Although she is part owner of that property and was against the sale, her other siblings (co-owners) forced the action. She stated she was searching for an alternate property to relocate the business within Jacksonville Beach.

City of Jacksonville Beach Code of Ordinances requires towing companies on the wrecker call list to be located within the City of Jacksonville Beach. Currently, Beach Body Towing is the only company on the list; if Beach Body Towing was unable to remain within the City, an ordinance change would be required. Ms. Parsons recently informed me she purchased a new property for the business (914 7th Avenue South) and will begin moving the business in October 2025.

Once Ms. Parsons has completed the move, and the new location is verified by the Police Department, Chief Smith will notify the City Council and the City Manager. The applicable sections of the ordinance concerning the requirements for the Police Department's rotating wrecker call list are below.

Sec. 31-53. - Establishment of rotating wrecker call list.
The chief of police, subject to approval by the city manager, is authorized to establish standards and rules for the administration of a rotating wrecker call list to provide safe and dependable wrecker service to the city. All wrecker and towing firms, companies, or corporations licensed to conduct that business with the city may apply for a listing by the police department on the rotating wrecker call list.

Sec. 31-54.1. - Business site requirements.
No person, firm, company or corporation will be considered by the Jacksonville Beach Police Department if the following conditions exist: Place of business is not inside the City of Jacksonville Beach.

FINANCIAL IMPACT

COUNCIL DIRECTION REQUESTED

Informational only.

ATTACHMENTS

City of Jacksonville Beach ● 11 North Third Street ● Jacksonville Beach, FL 32250

CITY COUNCIL BRIEFING TOPIC	
TO:	Michael J. Staffopoulos, City Manager
FROM:	Trevor Hughes, Chief of Parks Development and Maintenance
DATE:	September 8, 2025
SUBJECT:	Golf Course Bylaws and Rate Resolution

BACKGROUND

The Jacksonville Beach Golf Course has experienced tremendous success since its 2018 renovation. Demand for tee times is exceptionally high, with the tee sheet consistently selling out daily. While this success reflects the popularity of the course, it has also created challenges for equitable public access. Citizens have expressed frustration regarding the limited availability of tee times, particularly citing the impact of existing league play.

Currently, league play occurs six days per week, occupying a substantial number of tee times. These leagues are managed by outside group leaders rather than City staff, creating concerns about fairness and consistency. In addition, while tee time reservations are available online, the current booking window (21 days for Beach Pass holders, 14 days for non-pass holders, both at 7:00 PM) has been raised as another area in need of review.

Concerns Identified

- Limited Public Access: League play dominates the tee sheet, restricting opportunities for the public.
- Equity in Tee Times: Citizens without league access struggle to secure reservations.
- Non-Resident Benefits: Both residents and non-residents currently have access to Beach Passes, reducing priority opportunities for Jacksonville Beach residents.
- Booking Fairness: Current reservation windows and timing make it difficult for many users to compete for high-demand slots.

Proposed Changes Effective January 1, 2026

1. League Play Adjustments

- Reduce league play from six days to four days per week.
- Leagues will be managed by Pro Shop staff, ensuring consistency and fairness.
- Four designated leagues will be offered:
    1. Men’s League Wednesday
    2. Ladies’ League Tuesday
    3. Saturday Mixer
    4. Sunday Mixer

This change will free up approximately 35 tee times (140 golfers) per week for public use.

2. Tee Time Booking Window

- Beach Pass holders: 10-day advance booking, opening in the early AM hours.
- Non-pass holders: 7-day advance booking, opening in early AM hours.

The adjustment is intended to balance fairness while still rewarding Beach Pass holders.

3. Beach Pass Policy

- Limit Beach Pass eligibility to Beaches Energy Services customers only.
- Eliminate the current non-Beaches Energy Beach Pass option.

4. League Fees

- Introduce a new league participation fee to support League operations and management.

5. Rate Adjustments

- Implement a modest rate increase to reflect course demand and support continued high-quality maintenance and service.

6. Golf Course Bylaws

- Golf Course bylaws are being updated for the first time since 2011 to address citizen concerns and ensure alignment with current practices.

Expected Outcomes

- Improved public access to tee times.
- More equitable and transparent league management.
- Prioritization of Beach residents through Beach Passes available to Beaches Energy Services residential customers.
- Increased revenue to sustain course operations through league fees and adjusted rates.

Recommendation
Staff recommend adopting the proposed changes effective January 1, 2026, to address citizen concerns, improve fairness in tee-time access, and sustain the continued success of the Jacksonville Beach Golf Course.

FINANCIAL IMPACT

COUNCIL DIRECTION REQUESTED

1. Does the City Council agree with the proposed operational changes?
2. Does the City Council agree with the proposed changes to the Bylaws?
3. Does the City Council agree with the proposed rate changes?

ATTACHMENTS

1. Golf Course BY LAWS 2025
2. Attachment A to Golf Rate Resolution 2026
3. Rate Comparisons - Golf 2026

2025 BYLAWS OF THE CITY OF JACKSONVILLE BEACH D/B/A JACKSONVILLE BEACH GOLF CLUB ~~AND WHOMEVER HOLDS THE MOST CURRENT CONTRACT LISTING THEM AS "PERMITTEE" FOR THE FOOD AND BEVERAGE OPERATION~~

PURPOSE OF CLUB

~~To provide recreational facilities and activities for the benefit, pleasure and health of its members and their guests.~~

~~To provide a convivial year round social environment in which members and their guests can relax in the company of their friends~~.

The Jacksonville Beach Golf Club is established to provide accessible, affordable, and high-quality recreational golfing opportunities for residents and visitors. These bylaws govern the use of the course and promote safe, fair, and enjoyable play.

AUTHORITY

The City Manager shall establish policies for the golf course and Golf Club. The following definitions shall be incorporated in the policies:

ADVANCED GROUP RATE: A rate provided for groups with 12 or more participants seeking to book tee times in advance of the standard period. The rate shall be the prevailing rate plus the group rate premium per golfer.

ANNUAL PASS: Prepayment of Greens Fees in advance. No new passes shall be issued as of January 1, 2002. Passes that exist on the effective date of these Bylaws may be renewed on the annual anniversary of the date of purchase. Any passes not renewed within 30 days of the annual anniversary date will expire and will not be eligible for renewal. Annual Pass fees are $395 for residents and $600 for non-residents. Cart fees for Annual Pass holders are $20 for 18 holes and $15 for 9 holes. Annual Passes are not transferrable.

BEACH PASS: A person who is an active Beaches Energy Services (BES) residential customer. All applicants will be verified through Utility Billing and a current Driver's License. If utilities are not listed in applicant's name, applicant's name is required to be listed as a third party at that residential address in the Utility Billing system. BES Residential Customers qualify for the Beach Pass, which is valid for 365 days from date of purchase.

COLLEGE GOLFER: A full-time college student currently participating on a collegiate golf team.

FIRST RESPONDER: Active or retired military personnel, or active police, EMT or fire fighter personnel. First Responder rates apply Monday through Thursday only (walking or riding). First Responder rates do not apply on Holidays that fall on weekdays.

GOLF STAFF EMPLOYEES: Golf staff employees may play with their guests only during unused tee times and at the discretion of the Head Golf Professional. The golf staff employee rate is stipulated in the Rate Resolution and their guests may pay the Beach Pass rate.

JUNIOR: A person 15 years of age or under. Junior rates apply after 12:00 p.m. (noon) weekdays and weekends (walking or riding).

LEAGUE FEE: An annual fee, paid per golfer, to join one of the recognized leagues at Jax Beach Golf Club. It does not include greens fees or cart fees.

SENIOR: A person, age 65 or over, regardless of the location of the senior's residence. Senior rates apply Monday through Thursday only (walking or riding). Senior rates do not apply on Holidays that fall on weekdays.

SPECTATOR CART: A golf cart used by a non-golfer wising to accompany a playing golfer in a separate golf cart.

SHOTGUN START: Groups or tournaments wishing to include shotgun starts must have a minimum of 80 golfers and will be charged the prevailing rate plus shotgun premium per golfer.

TOURNAMENT: A scheduled, organized event that requires the prior written approval (to include the tournament rate) of the City Manager or his/her designated representative.

GENERAL RULES OF PLAY

1. USGA Rules: All play shall be governed by the current rules of the United States Golf Association (USGA), except where modified by local rules posted by the course.

2. Tee Times: Tee times must be scheduled in advance via phone, online booking, or in person. Golfers must arrive at least 15 minutes before their scheduled tee time.

3. No Call/No Show: One no call/no show results in online booking being disabled. The Head Golf Professional or Assistant Golf Professionals may reinstate online booking with written explanation on the no show.

4. Pace of Play: Groups must maintain pace with the group ahead. Maximum time for 18 holes is 4 hours and 15 minutes, unless otherwise authorized.

5. Dress Code: Proper golf attire is required—collared shirts, golf shoes or soft spikes. Swimwear, tank tops, cut-offs, or offensive graphics are prohibited.

6. Alcohol & Conduct: Alcoholic beverages must be purchased on-site. Disorderly conduct, profanity, or harassment will result in removal from the premises.

7. Rain Checks: A Rain Check is only issued when the Head Golf Professional or designee decides to suspend play or close the course due to rain, lightning, or unsafe conditions. It allows golfers to return and play the remaining holes at a later date without paying the full green fee again. Monetary value credit will be issued in the form of a Rain Check that may be applied to future play. The value of the Rain Check is prorated based on the number of holes that have been played. For example, a golfer that has played 5 holes of an 18-hole round might receive a Rain Check for the remaining 13 holes. Rain Checks are not transferable and are valid for 90 days. A Rain Check may not be offered if a golfer voluntarily chooses to stop playing without official closure.

GOLF CARTS

1. All operators of riding carts must hold a valid motor vehicle operator's license. This includes Junior Golfers even though they may have an adult in the cart.

2. Each riding cart, no matter the number of seats, is limited to two players and two bags of clubs.

3. Golf carts must remain on designated paths and avoid restricted zones. Players must keep carts on cart paths where provided, away from all teeing areas and 50 feet from all greens.

4. Physically disabled players may be authorized by the Head Golf Professional to drive their carts within 30 feet of the greens. This exception does not permit riding carts to be driven between a bunker and the putting green.

5. Carts should not be driven in muddy areas or in areas under repair.

6. Carts are not allowed in the parking lot.

7. All private carts must be registered with the Golf Club before they are allowed access to any part of the golf course.

CARE OF THE COURSE

1. All players are required to rake the bunkers from the low side, retracing their steps so as to disturb the surface as little as possible. Rakes are to be left with the head of the rake in the bunker and approximately 1 foot of the handle resting outside the bunker.

2. Every player must repair ball marks on the greens.

3. Players are responsible for filling divot holes with dirt/sand/seed mixture. All walking players must carry tubes of the mixture as specified by the Club.

4. Pull carts and motorized pull carts are to be kept off tees and at least 15 feet away from greens. These carts are not allowed between bunkers and greens. They should be pulled or propelled below and around bunkers.

~~**HOLIDAYS:** Defined as follows and will be recognized at the Jacksonville Beach Golf Club. (Golf cart usage will be required prior to 12:00 on all holidays):~~

a. ~~Columbus Day~~
b. ~~Veterans Day~~
c. ~~Thanksgiving Day~~
d. ~~Friday after Thanksgiving~~
e. ~~Christmas Day~~
f. ~~New Year's Day~~
g. ~~Martin Luther King Day~~
h. ~~President's Day~~
i. ~~Memorial Day~~
j. ~~Independence Day~~
k. ~~Labor Day~~

HOLIDAYS AND SPECIAL HOURS

1. Holiday Rate: Weekend rates apply to all public holidays. In addition, weekend rates may apply to TPC week, Florida-Georgia week, the Friday after Thanksgiving, and the week between Christmas and New Years.

2. Observed Holidays: The Jacksonville Beach Municipal Golf Course observes all public holidays including Christmas Eve. The golf course may be closed on Christmas Day, December 25th.

3. Modified Hours: On holidays or days of extreme weather, the Head Golf Professional may authorize modified hours of operation, closures, or special play arrangements.

4. Cart Usage: Golf cart usage will be required prior to 12:00 p.m. (noon) on all holidays.

5. Advance Notification: Any changes to holiday hours or closures will be posted on the official course website and clubhouse bulletin board at least 7 days in advance when possible.

6. Tournament Blackout Dates: Certain holidays may be designated as blackout dates where no tournament or group events are permitted unless pre-approved by the City Manager or his or her designee.

~~**GOLF ASSOCIATIONS:** Defined as groups recognized by the City of Jacksonville Beach Golf Course. Tee times are reserved in advance for their use. However, tournaments or holidays or course maintenance may cause a deviation in their schedule. The golf professional can alter these times to work in the best interests of the golf course. The recognized associations are: Men's/Ladies/Seniors/Juniors.~~

GROUP & LEAGUE PLAY

1. All League play is controlled and administered by the Head Golf Professional or a designated staff member.

2. Tee times are reserved in advance for League use. However, tournaments, holidays, or course maintenance may cause a deviation in the schedule. The Head Golf Professional may alter these times to work in the best interests of the golf course.

3. League play is limited to the following recognized Leagues:

- Tuesday Ladies League
- Wednesday Mens League
- Saturday Mixer
- Sunday Mixer

4. Group: A group outing is defined as a reservation of 12 or more golfers for a block of tee times. Tee times for group bookings are allowed after 10:00 AM, subject to availability at the discretion of the Head Golf Professional.

5. Conduct & Etiquette: All participants must adhere to course rules. Chronic slow play or misconduct may result in suspension of booking privileges.

TOURNAMENT PLAY

1. Tournament Approval: All tournaments must be approved by the Jacksonville Beach Parks & Recreation Department and scheduled with the Head Golf Professional.

2. Fees & Deposits: Entry fees and deposits must be submitted no later than 14 days in advance. A refundable damage deposit may also be required.

3. Tournament Format: Formats (stroke play, scramble, etc.) must be declared upon registration. Shotgun starts require at least 80 players and must be pre-authorized by the Head Golf Professional.

4. Rules Enforcement: Tournament directors must appoint a rules official or rely on course staff. Disputes are resolved using USGA rules and course staff guidance.

5. Cancellations: Must be submitted in writing. Refunds follow the Jacksonville Beach Parks & Recreation cancellation policy.

DISCIPLINARY ACTION

1. Violations: Infractions—such as rule violations, harassment, tardiness, or property damage—may result in warnings, suspension, or financial charges.

2. Appeals: Disciplinary actions may be appealed in writing to the Parks & Recreation Director within 10 business days of notification.

~~**COUPON BOOK:** Defined as a book available to be purchased with varying numbers of coupons for use at the golf course.~~

~~**DAILY MEMBERSHIP:** Definition of Membership for Consumption of Alcoholic Beverages:~~

~~Golfers, guests, and visitors are prohibited from bringing any alcoholic beverage onto the premises of the City of Jacksonville Beach Golf Course. Consumption of alcoholic beverages lawfully purchased on the premises is limited to adult members (21 or older) of the City of Jacksonville Beach Golf Course. The following persons will be considered members for purposes of consumption of alcoholic beverages:~~

1. ~~A golfer that pays a posted fee to establish a Daily Membership;~~

2. ~~A golfer with a valid annual membership to the City of Jacksonville Beach Golf Club;~~
3. ~~A golfer that pays greens fees as a pass holder;~~
4. ~~A person who purchases one or more items from the Jacksonville Beach Pro Shop; and/or~~
5. ~~A person who purchases one or more food items in the Jacksonville Beach Golf Club restaurant, d/b/a/ Hero's 19th Hole.~~

~~SPECIAL GOLF RATES:~~

~~The City Manager has the authority to offer a promotional rate based on time and season to increase daily play. This will keep our golf course competitive with other facilities that offer specials during these periods. The City Manager per recommendation of the golf professional will set these rates.~~

~~CONSUMPTION OF ALCOHOL:~~

~~Consumption of alcoholic beverages is limited to daily members (21 or older).~~

FOOD AND BEVERAGE

All purchases of food and beverages consumed at the golf course must be made through the golf course concessionaire. Consumption of food and beverages purchased through outside sources is not allowed.

WAIVER OF FEES

1. Daily greens fees may be waived for all PGA professionals, golf course managers, and golf course superintendents upon presentation of proper identification. Visiting professionals, managers, and superintendents will be permitted to bring up to two guests with the greens fees waived, however cart fees are required. The Head Golf Professional or Golf Superintendent must be playing with the group.

2. Subject to any limitations in Florida Law, daily greens fees may be waived or reduced for current City of Jacksonville Beach golf professionals, Head Golf Professional, and Golf Course Superintendent with the prior written approval of the City Manager or his/her designee.

3. Daily greens fees and surcharge will be waived for students who are designated as members of the Duncan U. Fletcher Middle School or High School golf team during a practice or competitive match. This will be applicable only during their interscholastic season and is subject to availability of space and will not include any weekends or holidays.

DONATIONS

1. Donation Quantity: A maximum of 12 tee times per calendar year for non-profit organizations. This number may be subject to adjustment based on operational considerations. (One tee time is equivalent to 4 golfers playing together in a group).

2. Eligibility: Non-profit organizations within our community that align with our values and mission may apply for tee time donations.

3. Application Process: Eligible organizations may submit a formal request for tee time donations to the Head Golf Professional or the Director of Parks and Recreation. This request should include details about the event, its purpose, and how the tee times will be utilized. Eligible requests shall be submitted to the City Manager for approval.

4. Donation Schedule: Tee times will be donated on a first-come, first-served basis, subject to availability, and will be scheduled during non-peak hours to minimize disruption to regular paying customers.

5. Conditions:
   a) Donated tee times are non-transferable and non-refundable.
   b) The receiving organization is responsible for promoting the golf course as a sponsor and should acknowledge our support in their event materials.
   c) Any additional services or equipment required for the event will be the responsibility of the receiving organization.

6. Reporting: The Head Golf Professional shall maintain records of all tee time donations, including the recipient organization, date, and purpose of the donation.

ADMINISTRATION & AMENDMENTS

1. Authority: The Head Golf Professional, together with the Jacksonville Beach Parks & Recreation Department, is responsible for enforcing these bylaws.

2. Amendments: These bylaws may be modified by the Jacksonville Beach City Council through public notice and hearing.

ATTACHMENT A - Resolution 2199-2025

Jax Beach Golf Club - Rates as of January 1, 2026

All rates include Sales Tax

Tax Rate: **7.50%**

18 Holes

Riding:	Week Days Current	Week Days Proposed	Inc.	%	Week Ends Current	Week Ends Proposed	Inc.	%
Floor rate	$ 47.00	$ 47.00	$ -	-	$ 58.00	$ 58.00	$ -	-
Ceiling rate	$ 54.00	$ 60.00	$ 6.00	12%	$ 67.00	$ 72.00	$ 5.00	8%
Beach Pass	$ 42.00	$ 45.00	$ 3.00	8%	$ 46.00	$ 50.00	$ 4.00	9%
Senior or First Responder	$ 34.50	$ 38.00	$ 3.50	11%	na	na	na	na
Junior	$ 12.90	$ 13.00	$ 0.10	1%	$ 12.90	$ 13.00	$ 0.10	1%
Annual Pass	$ 21.50	$ 21.50	$ -	-	$ 21.50	$ 21.50	$ -	-
College Golfer	$ 21.50	$ 21.50	$ -	-	$ 21.50	$ 21.50	$ -	-
Walking:								
Floor rate	$ 31.00	$ 31.00	$ -	-	$ 58.00	$ 58.00	$ 0.00	-
Ceiling rate	$ 31.00	$ 35.00	$ 4.00	14%	$ 67.00	$ 72.00	$ 5.00	8%
Beach Pass	$ 26.00	$ 28.00	$ 2.00	8%	$ 46.00	$ 50.00	$ 4.00	9%
Senior or First Responder	$ 23.50	$ 26.00	$ 2.50	11%	na	na	na	na
Junior	$ 10.75	$ 11.00	$ 0.25	3%	$ 12.90	$ 13.00	$ 0.10	1%

9 Holes

Riding:	Week Days Current	Week Days Proposed	Inc.	%	Week Ends Current	Week Ends Proposed	Inc.	%
Floor rate	$ 29.00	$ 29.00	$ -	-	$ 33.50	$ 33.50	$ -	-
Ceiling rate	$ 36.50	$ 40.00	$ 3.50	10%	$ 41.00	$ 45.00	$ 4.00	10%
Beach Pass	$ 25.00	$ 28.00	$ 3.00	13%	$ 28.00	$ 30.00	$ 2.00	8%
Senior or First Responder	$ 22.50	$ 25.00	$ 2.50	12%	na	na	na	na
Junior	$ 8.60	$ 9.00	$ 0.40	5%	$ 8.60	$ 9.00	$ 0.40	5%
Annual Pass	$ 16.13	$ 16.50	$ 0.38	3%	$ 16.13	$ 16.50	$ 0.38	3%
College Golfer	$ 16.13	$ 16.50	$ 0.38	3%	$ 16.13	$ 16.50	$ 0.38	3%
Walking:								
Floor rate	$ 24.00	$ 24.00	$ -	-	$ 33.50	$ 33.50	$ 0.00	-
Ceiling rate	$ 24.00	$ 26.00	$ 2.00	9%	$ 38.70	$ 39.00	$ 0.30	1%
Beach Pass	$ 19.50	$ 21.00	$ 1.50	8%	$ 28.00	$ 28.00	$ -	-
Senior or First Responder	$ 18.00	$ 20.00	$ 2.00	12%	na	na	na	na
Junior	$ 6.45	$ 6.50	$ 0.05	1%	$ 8.60	$ 9.00	$ 0.40	5%

OTHER RATES

	Current	Proposed	Inc.	%
Driving Range Small 25 balls	$ 5.00	$ 5.00	$ -	-
Driving Range Medium 50 balls	$ 9.00	$ 10.00	$ 1.00	12%
Driving Range Large 75 balls	$ 12.00	$ 13.00	$ 1.00	9%
League Fee per golfer per year	na	$ 50.00	$ -	$ -
Beach Pass	$ 161.25	$ 175.00	$ 13.75	9%
Pull Cart Rental	$ 6.45	$ 7.00	$ 0.55	9%
Spectator cart	$ 21.50	$ 22.00	$ 0.50	3%
Rental clubs 9 holes	$ 16.13	$ 17.00	$ 0.88	6%
Rental clubs 18 holes	$ 26.88	$ 28.00	$ 1.13	5%
Rental Clubs Premium	$ 43.00	$ 43.00	$ -	-
Golf Staff Employees	$ 5.38	$ 5.50	$ 0.13	3%
*Advanced Group Rate	$ 10.75	$ 11.00	$ 0.25	3%
**Shotgun start 80 players min	$ 32.25	$ 33.00	$ 0.75	3%

* Advanced Group Rate is prevailing rack rate plus rate shown above, per player

** Shotgun Start rate is the prevailing rack rate plus the rate shown above, per player,

Golf Course Comparison Rates

	Fernandina	St Johns	Sebastian	Windsor Park	Hidden Hills	Queens Harbor	Jax Beach Current	Jax Beach Proposed	Inc.
Week Days									
18 Holes with Cart	$ 70.00	$ 54.00	$ 58.00	$ 48.00	$ 49.00	$ 74.00	$ 54.00	$ 60.00	11.1%
18 Holes Walking	$ 60.00	$ 49.50	$ 47.00	na	na	na	$ 31.00	$ 35.00	12.9%
9 Holes with Cart	$ 50.00	na	na	$ 48.00	$ 30.00	$ 54.00	$ 36.50	$ 40.00	9.6%
9 Holes Walking	$ 31.00	$ 30.00		na	$ 35.00	na	$ 24.00	$ 26.00	8.3%
Senior Rate - First Responder	na	na		na	$ 45.00	na	$ 34.50	$ 38.00	10.2%
Junior Rate	$ 40.00			na	$ 39.20	na	$ 12.90	$ 13.00	0.8%
Weekends									
18 Holes with Cart	$ 70.00			$ 73.00	$ 75.00	$ 88.00	$ 67.00	$ 72.00	7.5%
18 Holes Walking	$ 60.00			na	na	na	$ 67.00	$ 72.00	7.5%
9 Holes with Cart	$ 50.00			na	$ 44.00	$ 54.00	$ 41.00	$ 45.00	9.8%
9 Holes Walking	$ 31.00			na	$ 39.00	na	$ 38.70	$ 39.00	0.8%
Senior Rate	na			na	$ 70.00	na	na	na	na
Junior Rate	$ 40.00			na	$ 60.00	na	$ 12.90	$ 13.00	0.8%
Driving Range									
Small Bucket	$ 7.00	$ 6.50	$ 5.00		$ 10.00	$ 9.00	$ 5.00	$ 5.00	0.0%
Medium Bucket	$ 12.00	$ 12.00	$ 9.00		na	na	$ 9.00	$ 10.00	11.1%
Large Bucket	$ 18.00	$ 17.00	$ 12.00		na	na	$ 12.00	$ 13.00	8.4%

CITY COUNCIL BRIEFING TOPIC	
TO:	Michael J. Staffopoulos, City Manager
FROM:	Heather Ireland, Director of Planning and Development
DATE:	September 8, 2025
SUBJECT:	Live Local Act Expansion Review

BACKGROUND

The Live Local Act (LLA), adopted in 2023, and also referred to as Senate Bill (SB) 102, is a comprehensive workforce housing initiative aimed at increasing the availability of affordable housing options for the Florida workforce, in theory, by increasing opportunities for employees to reside within the communities they serve and providing housing for the "missing middle". Missing middle housing generally refers to the lack of medium-density housing in a community.

While the LLA contains a variety of funding incentives for developers to provide affordable housing options to communities, it also preempts local governments' existing land use and zoning regulations, including height, density and parking regulations. These new rules also intrude on local short- and long-term planning efforts of counties and municipalities, with the potential to create incompatible uses in existing established communities and neighborhoods.

ZONING AND LAND USE

Pursuant to SB 102, counties and municipalities must administratively authorize multifamily and mixed-use residential development projects that meet the definition of affordable housing pursuant to Section 420 of Florida Statutes, as allowable uses in any area zoned for commercial, industrial, or mixed-use. In 2025, SB 1730 added to that list parcels owned by and contiguous to a religious institution which includes a house of public worship. SB 1730 also added that municipalities must authorize affordable housing in portions of any flexibly owned area, such as planned unit development permitted for commercial, industrial or mixed use.

PREEMPTIONS

Pursuant to SB 102, counties and municipalities are prohibited from requiring any change of zoning or future land use, and any special exception, conditional use, or variance for development projects meeting the statutory definition of affordable housing. In 2025, SB 1730 added a prohibition on the transfer of density or development rights, amendments to an existing development of regional impact, or amendments to a municipal charter. Additionally, municipalities are also prohibited from requiring any special approvals for height or density. SB 1730 also added that municipalities may not require more than 10% of the total square footage of a mixed-use affordable housing project to be used for nonresidential purposes.

DENSITY

Pursuant to SB 102, counties and municipalities may not restrict the density of a proposed development below the highest density currently allowed on any land in the municipality where residential development is allowed under the local Land Development Code. In 2025, SB 1730 added the date of July 1, 2023, as the starting date for density determination, and further clarified that the "highest currently allowed or allowed on July 1, 2023" means whichever is the least restrictive at the time of development. *Note: the maximum residential density in Jacksonville*

Beach is 40 units per acre within the high-density residential future land use category.

FLOOR AREA RATION (FAR)

Pursuant to SB 102, a municipality may not restrict the FAR of a proposed development below 150 percent of the highest currently allowed FAR on any land in the municipality where development is permitted in the municipality's Land Development Code. In 2025, SB 1730 added the date of July 1, 2023, as the start date for FAR determination. *Note: currently the COJB 2050 Comprehensive Plan does not contain FARs, as the intensity of development is controlled by height and design standards contained within the adopted Land Development Code.*

HEIGHT

Pursuant to SB 102, a municipality may not restrict the height of a proposed affordable housing development below the highest currently allowable height for a commercial or residential building located in the jurisdiction within one mile of the proposed development or 3 stories, whichever is higher. The preemption on height furthermore clarifies that if a proposed development is adjacent to, on two or more sides, a parcel zoned for single-family residential with at least 25 contiguous single-family homes, the municipality may restrict the height of the proposed development to 150 percent of the tallest building on any property adjacent to the proposed development, the highest currently allowed or allowed on July 1, 2023, or three stories, whichever is higher, not to exceed 10 stories. The term "adjacent" is specifically defined in this section of the statute, and exceptions contained within this section of the Statute were expanded in 2025. *Note: The maximum building height currently allowed for any structure in Jacksonville Beach is 35 feet, with a few strict exceptions.*

APPROVALS

Pursuant to SB 102, a proposed development must be 100 percent administratively approved with no action by the governing body if the development complies with local development regulations for multifamily developments in areas zoned for such use, and is consistent with the Comprehensive Plan except for the provisions for density, height, FARs, and land use. The City may still regulate parking, landscaping, and setbacks. SB 1730 added that no approval may be required from the governing body OR any quasi-judicial or administrative board or reviewing body. This includes the City's Planning Commission functioning as the Local Planning Agency, and the Board of Adjustment in addition to the City Council.

PARKING

Pursuant to SB 102, a municipality must consider reducing parking requirements for a proposed development under the LLA Act. SB 1730 updated this provision to require a municipality to reduce parking by 15 percent upon the request of an applicant if the development meets certain requirements in the statute for proximity to transit.

ADDITIONAL NEW PROVISIONS FROM SB 1730

- A municipality may allow an "adjacent" parcel of land to be included with a proposed affordable housing development.

- Priority will be given to any civil case filed against a municipality for violation of the statute, and reasonable attorney fees and will be awarded to the prevailing party in an amount not to exceed $250,000.
- The statute now provides definitions for the terms: “commercial use”, “industrial use”, “mixed-use” and “planned unit development”.
- Areas that the section does not apply to were expanded to include the Wekiva Study Area and Everglades Protection Area, in addition to the already listed airport-impacted areas and areas listed as recreation and commercial working waterfronts.
- A municipality may not enforce a building moratorium that has the effect of delaying the permitting or construction of an affordable housing development as defined by statute, except a municipality may enforce a moratorium for no more than 90 days in any three-year period, and only after an assessment of the municipality’s need for affordable housing is prepared, posted and included in a business impact estimate for the moratorium ordinance. Moratoria imposed or enforced to address stormwater or flood water management, potable water supply, or due to the necessary repair of sanitary sewer systems are exempt if they apply equally to all types of multifamily and mixed-use developments.
- Beginning on November 1, 2026, all municipalities must provide the state land planning agency with an annual report that summarizes any litigation that was initiated, pending, or resolved, and a list of all projects proposed and approved. Additionally, applicants may revise existing proposals to comply with the updated 2025 statutes. SB 1730 also added new language to Section 420 of Florida Statutes to further support affordable housing for the public sector and hospital employer-sponsored housing.

FINANCIAL IMPACT

COUNCIL DIRECTION REQUESTED

Update only for discussion purposes.

ATTACHMENTS

CITY COUNCIL BRIEFING TOPIC	
TO:	Michael J. Staffopoulos, City Manager
FROM:	Ashlie Gossett, Chief Financial Officer
DATE:	September 8, 2025
SUBJECT:	Purchasing Ordinance and Manual Update Project

BACKGROUND

The City's Purchasing Manual was last updated in 2008, so staff developed a strategic plan project to review both the Ordinance and Manual and propose changes as needed. The goals of this project were to:

1. Ensure regulatory compliance
2. Provide important safeguards to mitigate risk
3. Support strategic City objectives
4. Simplify the buying process

Based on user feedback and staff research, the decision was made to completely rewrite the document instead of making red-line changes to the existing format. The attached chart provides a summary of substantive updates and requested policy changes for Council consideration.

Once Council provides direction, and City departments provide feedback, the new manual will be brought before Council for formal adoption via Resolution. Any changes to bid threshold amounts must be adopted via Ordinance.

FINANCIAL IMPACT

None.

COUNCIL DIRECTION REQUESTED

Does the Council agree with the policy changes?

ATTACHMENTS

1. Chart - Purchasing Manual Proposed Changes
2. Purchasing Manual and Directives
3. Purchasing Ordinance

PURCHASING ORDINANCE AND MANUAL UPDATE PROJECT

City Council Briefing 9/8/2025

New Manual Chapter	Substantive Changes from Current Manual	Current Manual Section(s)
Title: Procurement Manual	Change name from purchasing to procurement to reflect broader scope of sourcing goods and services, including supplier selection and relationship management.	Title: Purchasing Manual
1. Policy Overview	Consolidates purpose, scope, and standards of conduct into one chapter.	IV, V, VI
2. Duties and Responsibilities in the Procurement Process	Adds clarifying language for all roles in procurement process.	II
3. Vendor Relations	Expands on vendor standards of conduct and adds guidance on payment disputes.	III
4. Procurement Process	Increases bid thresholds and add detail to different procurement options. *Proposed Threshold:* *1 Quote: $0-$2,500* *2 Quotes: $2,501-$10,000* *3 Quotes: $10,001-$50,000* *Formal Bid: + $50,000*	VII, VIII, XII *Current Threshold:* *1 Quote: $0-$500* *2 Quotes: $501-$2,500* *3 Quotes: $2,501-$25,000* *Formal Bid: + $25,000*
5. Construction and Professional Services	Chapter added to provide guidance on State Statutes regarding construction.	n/a
6. Emergency Purchases	Add clarifying language and aligns with State Statutes and FEMA grant requirements.	XI
7. Public Private Partnerships	Chapter added to reflect strategic plan goals and comply with State Statutes.	n/a
8. Purchasing Card Program	Increase monthly limits *Proposed Limits:* *Single purchase: $2,000* *Monthly Limit: $5,000*	XVII *Current Limits:* *Single purchase: $1,000* *Monthly Limit: $2,500*
9. Storeroom	Adds process for changes to stock items; codifies stock rotation methodology as *first-in-first-out* .	XIII
10. Surplus Property	Adds clarifying language and process for electronic equipment disposal; adds guidance on grant funded property; add surplus procedure. Codifies Ord. No. 2020-8160.	XV
11. Petty Cash	Add policy on changes to petty cash accounts to incorporate current practice.	IX
12. Food and Beverage	Codifies internal policy.	n/a
13. Solicitation Protests	Adds informal hearing step before protest is brought before Council.	XII
14. Suspension and Debarment	Added to comply with Federal grant requirements.	
15. Glossary	Added for ease of use.	n/a

City of Jacksonville Beach
Purchasing Manual

October 2008

City of Jacksonville Beach
Purchasing Manual

City of Jacksonville Beach
Purchasing Manual

Section	Contents	Page

F O R E W A R D

One of the important activities in the City is Purchasing and Procurement, which is a service function for all City Departments. Purchasing and Procurement is the process of acquiring the best possible prices for materials, services, supplies, and equipment required for efficient and effective City operations.

This Purchasing Manual has been prepared to assist employees who are assigned Purchasing and Procurement duties. This Manual is intended to act as a guide, which sets forth duties and responsibilities while assisting employees in maintaining the City's purchasing and procurement mission.

The Manual sets forth the City's Purchasing and Procurement Policies and serves as a framework for all Departments.

The goal, therefore, is the promotion of the City's best interest through intelligent Purchasing and Procurement decisions and fair dealings with vendors that result in the maximum value for the City of Jacksonville Beach.

George D. Forbes, City Manager ________________ Date

Harry Royal, Finance Officer ________________ Date

Adopted by City Council on November 2, 1998

Amended by City Council on February 2, 2004

Amended by City Council on June 2, 2008

Amended by City Council on October 20, 2008

CODE OF ETHICS AND CONDUCT

Public purchasing officials are required to maintain complete independence and impartiality in dealing with vendors, both in fact and in appearance, in order to preserve the integrity of the competitive process and to ensure there is public confidence that contracts are awarded equitably and economically. The following are excerpts from Chapter 112, Part III, Florida Statutes, Code of Ethics for Public Officers and Employees:

Section 112.313 (2), Florida Statues, states:
SOLICITATION OR ACCEPTANCE OF GIFTS – No public officer, employee of an agency, or candidate for nomination or election shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor or service, based upon any understanding that the vote, official action, or judgment of the public officer, employee or candidate would be influenced thereby.

Section 112.313 (3), Florida Statues, states:
DOING BUSINESS WITH ONE'S AGENCY – No employee of an agency acting in his official capacity as a purchasing agent, or public officer acting in his official capacity, shall either directly or indirectly purchase, rent or lease any realty, goods, or services for his own agency from any business entity of which he or his spouse or child is an officer, partner, director, or proprietor or in which such officer or employee or his spouse or child or any combination of them, has a material interest. Nor shall a public officer or employee, acting in a private capacity, rent, lease, or sell any realty, goods or services to his own agency, if he is a state officer or employee, or to any political subdivision or any agency thereof, if he is serving as an officer or employee of that political subdivision. The foregoing shall not apply to district offices maintained by legislators when such offices are located in the legislator's place of business. This subsection shall not affect or be construed to prohibit contracts entered into prior to:

(a) October 1, 1975;
(b) Qualification for elective office;
(c) Appointment to public office; or
(d) Beginning public employment

Section 112.313 (4), Florida Statues, states:
UNAUTHORIZED COMPENSATION – No public officer or employee of an agency or his spouse or minor child shall, at anytime, accept any compensation, payment, or thing of value when such public officer or employee knows, or with the exercise of reasonable care, should know, that it was given to influence a vote or other action in which the officer or employee was expected to participate in his official capacity.

Section 112.313(7), Florida Statues, States:
CONFLICTING EMPLOYMENT OR CONTRACTUAL RELATIONSHIP-

(a) No public officer or employee of an agency shall have or hold any employment or contractual relationship with any business entity or any agency which is subject to the regulation of, or is doing business with, an agency of which he is an officer or employee, excluding those organizations and their officers who, when acting in their official capacity, enter into or negotiate a collective bargaining contract with the state or any municipality, county or other political subdivision of the state; nor shall an officer or employee of an agency have or hold any employment or contractual relationship that will create a continuing or frequency recurring conflict between his private interests and the performance of his public duties or that would impede the full and faithful discharge of his public duties.

In order to avoid the possibility of any misunderstanding regarding compliance with law and regarding any appearance of impropriety relative to the competitive process for awarding contracts, the City employees shall not accept anything of value offered from vendors.

PURCHASING ORDINANCE

CODE OF ORDINANCES
CITY OF
JACKSONVILLE BEACH, FLORIDA

ARTICLE I. IN GENERAL

Sec. 2-1. Purchase of materials, etc., in excess of specified amount; publication of notice for bids—Definitions.

Sec. 2-1.1. Purchase procedures; contracts, etc.

Sec. 2-1.1. Purchase procedures; contracts, etc.

(a) *Purchase procedure.* Unless authorized by the city council, before any expenditure for commodities or contractual services exceeding a bid threshold amount of twenty-five thousand dollars ($25,000.00) may be legally incurred by the city, a competitive award must be made. To make a competitive award, invitations to bid or requests for proposals/qualifications require that public notice be given by publication of a legal notice at least once in a newspaper of general circulation not less than seven (7) days prior to making any such purchase or awarding a contract therefore. The public notice must specify or describe clearly the kind, amount, and nature of such commodities, or contractual services intended to be purchased or contracted for by the city. This subsection shall apply to all purchases of commodities or contractual services except professional services.

(b) *Award of contract.* When the city has advertised to competitively award, the award must be made to the lowest responsive and responsible bidder. The lowest responsive and responsible bidder must be judged on the basis of price, conformance to specifications, bidders' qualifications including the bidders' past performance in such matters, quality and utility of services, supplies, materials or equipment offered and their adaptability to the required purpose and in the best interest of the public, each of the factors considered.

1. *Right to reject bid/proposals for commodities/contractual services.* The city shall reserve the right to reject any or all bids/proposals and such reservation shall be indicated in all advertising and invitations to bid/requests for proposal.
2. *Right to waive minor irregularities for commodities/contractual services.* The city shall reserve the right to waive any minor irregularities in an otherwise valid bid/proposal. Variations which are not minor cannot be waived.

3. *Bid modification for commodities/contractual services.* A bidder or offer or may not modify its bid after bid/proposal opening. Mistakes in an arithmetic extension of pricing may be corrected by the city.

(c) [*Applicability.*] The provisions of subsection (a) do not apply:

1. When the project is undertaken to replace, reconstruct or repair an existing facility damaged or destroyed by a sudden turn of events, such as an act of God, riot, fire, flood, accident or other urgent circumstances, and such damage or destruction creates:
    a. An immediate danger to the public health or safety;
    b. Other loss to public or private property which requires emergency government actions; or,
    c. An interruption of an essential government service.

2. When the government entity does not receive any responsive bids after a request to competitively award.
3. When single source purchases are approved by city council.
4. Purchases of electricity by the Florida Municipal Power Agency.
5. Purchases utilizing competitive bids from other government entities. The city manager or his designated representative may approve the purchase of commodities or contractual services utilizing competitive bids from other governmental entities including but not limited to federal, state, and local government entities.

(c) *Contracts which require an annual appropriation; contingency statement.* The city shall not enter into any contract for the purchase of tangible personal property for a period in excess of one fiscal year, unless the following statement is included in the contract: "The city's performance and obligation to pay under this contract is contingent upon an annual appropriation by the city council."

(d) *Title to property.* Whenever the city council determines that it possesses real or personal property in excess of the needs of the public, it shall sell same by a competitive award process or by public auction. Surplus property can also be disposed of by public auction, trading in on new commodities, donating it to another governmental agency or by junking if the property is determined to be unfit for sale and of no usable value.

(f) *Purchasing manual.* The city shall maintain a purchasing manual establishing purchasing policies, procedures and rules for all city departments. The purchasing manual must be adopted by the city council.

(Ord. No. 97-7708, § 1, 5-5-97; Ord. No. 2004-7869, § 1, 2-2-04; Ord. No. 2006-7910, § 1, 2-20-06; Ord. No. 2008-7958, § 1, 10-20-08)

RESPONSIBILITIES OF DIVISIONS AND DEPARTMENTS

The Purchasing and Procurement Division is a service function for all City Departments and provides purchasing and procurement assistance to all Departments. The Division, with the cooperation of all City Departments, maintains an inventory of materials and supplies, used on a regular basis by the Departments. Some inventory items are universal to several Departments and by pooling the City's inventory requirements and buying in larger quantities, the City's material and supply costs are reduced.

The Purchasing and Procurement Division staff are available for any support required by the Departments during the purchasing and procurement process.

A. Responsibilities of Purchasing and Procurement Division

1. To train all City employees, who perform purchasing and procurement functions, in the use of the computerized purchasing system and on all related policies and procedures.

2. To assist Departments in the purchase and procurement of materials, supplies, and services.

3. To provide source and availability information to all Departments.

4. To assist and cooperate with all Departments in meeting their requirements for materials, supplies, and services.

B. Responsibilities of Departments

1. To prepare or have prepared technical and engineering related specifications when required.

2. To requisition needed materials, supplies, and services in advance of the date required.

3. To comply with all Ordinances, policies, and procedures as provided in this Manual when performing all aspects of purchasing and procurement.

RELATIONS WITH VENDORS' REPRESENTATIVES

Departments should not be burdened by vendors' sales representatives who do not have a specific appointment with the Departments. These sales representatives should be directed to, and shall be received by, the Purchasing and Procurement Division. This practice is recommended to avoid the loss of productive time within the Departments. The following procedures should be observed:

A. Sales representatives who visit Departments without an appointment should be directed to the Purchasing and Procurement Division. The Division will receive the representatives promptly and courteously and will forward any useful information to the appropriate Departments.

B. All useful information received by the Departments from sales representatives such as catalogs, advertising, etc., should be forwarded to the Purchasing and Procurement Division so that other Departments with similar needs can share the information.

C. No public officer, employee, or candidate for nomination or election shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the public officer, employee, or candidate would be influenced thereby.

BUYING AT THE RIGHT PRICE

One of the objectives of the Purchasing and Procurement Division is to assist all Departments in procuring materials, supplies, and services at the lowest possible cost, consistent with the quality the Departments desire. The consideration of the price of an item comes subsequent to the acceptance of quality.

A low price paid to a distant supplier may be outweighed by transportation and packing charges. Large quantity orders may be out weighed by storage and handling costs, chance of obsolescence, or damages caused by environmental conditions. Consideration should never be given solely to low-price, and the City will not purchase inferior products.

In determining the delivered cost, consideration will be given to the FOB (freight on board) point, discounts, services offered by a supplier, spare parts, delivery date, and other considerations. Any purchases based solely on price do not provide an overall low-cost purchasing program for the City. Purchases shall be made on the basis of price, conformance to specifications, qualifications, past performance, and the quality and utility of services, supplies, materials, equipment, and adaptability to the required purpose; to be in the best interest of the public, each of the factors shall be considered when making a purchasing decision.

BUYING AT THE RIGHT QUALITY

Quality means suitability for a particular purpose. A required item doesn't necessarily have to be the best or highest quality, but it should be the right quality for the intended purpose. The Departments, in cooperation with the Purchasing and Procurement Division, will work together and develop specifications for the procurement of the right quality for materials, supplies, and services.

In order to determine quality, the item required must be analyzed from the standpoint of the intended purpose, physical tests, measurements, and performance. Quality is not measured by price, and the City will not purchase inferior products. Products exceeding the quality standards are not required because the additional cost will outweigh the value received.

To secure the right quality, specifications will be written to allow vendors to understand the City's needs. Tests or inspections will be employed when needed to insure receipt of the quality actually required. The right quality may also be determined by use of market grades, commercial standards, matching samples, and under certain conditions, by referring to an existing brand name.

All specifications will be written to allow for good and fair competition and for the right quality.

BUYING AT THE RIGHT QUANTITY

The quantity of materials, supplies, and services being purchased is established by need, usage patterns, known scheduled requirement, changes in markets, size of storage facilities available, handling, availability, loss, and depreciation. These factors will be used when deciding the quantity to be purchased.

Departments will assist the Purchasing and Procurement Division in determining quantity. It is the responsibility of the Departments to provide the Purchasing and Procurement Division with an estimate of the quantity required for specific jobs or projects and the period of time the quantity requirement should remain in effect. It is also a Department's responsibility to inform the Purchasing and Procurement Division of any anticipated abnormal warehouse withdrawals or any use changes that render a warehouse item or service obsolete. Planning ahead and accurate forecasting of needs are crucial to purchasing the right quantity.

REQUISITIONS

A. Definition

Requisitions are the process used by all City Departments to initiate the procurement of materials, supplies, and services.

Requisitions should be prepared to allow time for competitive pricing, ordering, and delivery lead times.

B. Preparation of a Requisition

Requisitions are an on-line process and are entered into the City's IBM I520 Computer System.

In the Purchasing/Receiving Menu select Requisition Entry and enter the required information into the appropriate fields. Employees must have security access authorization to enter requisitions. Employee training is recommended and is available from the Purchasing and Procurement Division.

C. Routing of Requisition

Following the entry of a requisition into the system it will move through the approval process. The requisition must first be approved at the Department level by the Department Director or an authorized representative. If the requisition is equal to or less than $100.00 and has been approved at the Department level it will then go directly to the Purchasing and Procurement Division for processing. If the requisition is greater than $100.00 and has been approved at the Department level it will go to the Finance Department for approval, after approval by the Finance Department the requisition will then go to the Purchasing and Procurement Division for Processing.

After the Purchasing and Procurement Division processes the requisitions they are printed out as a purchase order (hard copy).

Any purchases in excess of the $25,000 Bid Threshold Amount must have prior City Council approval or must be approved and signed by the City Manager.

D. <u>Requisition Documentation</u>

The following documentation, if applicable, is required on all requisitions:

Quotations - Provide the company's or individual's name, prices, and name of the individual providing the quotation.

Sole Source Information - Provide sole source information in comments section of the requisition, then forward sole source letter to the Purchasing and Procurement Division.

Bid or RFP information – If requisition is for items or services from an approved bid or request for proposal (RFP), the Department must provide bid or proposal number and date approved by City Council in the comments section of the requisition.

<u>Requisitions without proper documentation will be returned to the Department.</u>

PURCHASE ORDERS

A. Definition

A purchase order provides a vendor with the authority to ship and invoice the City for materials or services. A purchase order is issued by the City when the Purchasing and Procurement Division has received a properly completed and approved requisition. Purchase orders must be clear and concise to avoid confusion and errors.

B. Issuing Purchase Orders

The Purchasing and Procurement Division shall issue or mail all purchase orders except:

1. When a Department requests approval to issue or mail the purchase order;
2. When an emergency purchase is made; or
3. When the purchase is a Field Order.

Emergency and Field Order purchases are outlined herein.

C. Routing of a Purchase Order Form

A standard purchase order form is printed (hard copy) for every requisition. The form has four (4) copies which are routed as follows:

Copies 1&2: (Vendor and Acknowledgment copies) these copies are sent directly to the vendor. The acknowledgment copy is completed by the vendor and returned to the Purchasing and Procurement Division.

Copy 3: (Accounting copy) this copy is temporarily filed in the Purchasing and Procurement Division awaiting receipt of the materials or services. When the materials or services have been received, invoiced, and paid (completed) this copy is sent to the Finance Department.

Copy 4: (Purchasing Copy) this copy is retained by the Purchasing and Procurement Division when the order is completed.

D. Change Orders

Change orders are classified as any authorized change to an original purchase order. Change orders require approval as follows:

1. Change orders that are equal to or less than ten percent (10%) of the original purchase order amount and less than the $25,000 Bid Threshold Amount, require approval by the Department Director and Purchasing and Procurement Division.

2. Change orders that are greater than ten percent (10%) of the original purchase order amount require approval by the Department Director, Finance Department, and Purchasing and Procurement Division.

3. Change Orders that exceed the $25,000 Bid Threshold Amount require approval by the City Manager and City Council. A change order above or below the $25,000 Bid Threshold Amount that does not exceed a contingency balance which was previously approved by the City Council, can be approved by the City Manager.

   *** On October 20, 2008 the City Council approved a $25,000 Bid Threshold Amount.**

E. Open Purchase Orders

An open purchase order is a purchase order issued for the purchase of miscellaneous materials, supplies, parts, etc., used by the City when the quantity cannot be anticipated or when it is not practical or feasible to provide adequate storage.

Requests for open purchase orders shall be made in the comment section of the on line requisition screen prior to submitting a requisition for approval. The Purchasing and Procurement Division will establish the period of time an open purchase order will remain valid. The change order procedures set forth in Section D above also apply to open purchase orders.

F. Follow-up and Expediting

The purchasing process is NOT completed when the purchase order is printed. The Purchasing and Procurement Division is responsible for initiating a follow-up process to assure delivery of materials and services as specified. City Departments are also responsible for tracking their purchase orders.

Departments can reduce the number of follow-up contacts required by carefully planning work which will allow sufficient time for routine purchases and delivery of materials and services. Requests for rush materials or services increase the City's cost for purchasing and procurement.

PETTY CASH

PROCEDURES

Petty cash purchases shall not exceed $75.00, and petty cash shall not be used to make emergency purchases. Exceptions to these procedures may be made with the approval of the Finance Officer.

Petty cash shall not be used to reimburse the following expenses:

Gasoline;
Items inventoried in Storeroom;
Office supplies;
Meals;
Memberships; or
Sales Tax.

Employees requesting reimbursement from petty cash should submit an approved petty cash voucher to the Utility Billing Department. The petty cash voucher shall contain the following:

Account number:	expense account
Reimbursed to:	name of the individual being reimbursed
Purchase of:	complete description of item purchased
Amount:	amount requested for reimbursement
Approval:	Department Director or other individual (stamped signature not acceptable)
Date:	date of request

Written expense receipts shall be attached to all petty cash vouchers. The Department Director shall be responsible for determining if the expenditure is for a public purpose.

The completed petty cash voucher will be reviewed by the Utility Billing Cashier. The Cashier will perform the following:

Confirm the requested reimbursement amount is equal to the expenditure;
Confirm that the description of the purchase is on the attached expense receipt; and
Confirm all approval signatures.

After the voucher has been properly completed and approved as required, the Cashier will initial the voucher and make the requested reimbursement. In the event the voucher was not properly completed and approved, as required herein, the voucher will be returned to the employee and the employee will be instructed to return the voucher to the Department Director for corrections and re-submittal.

FIELD PURCHASE ORDERS

A. Definition

A field purchase order is a process designed to save time and expense in procuring small, unanticipated, or emergency materials and services that do not exceed $100.00 for each purchase.

B. Procedures

Training is available from the Purchasing and Procurement Division for employees authorized to use field purchase orders. The IBM I520 Computer System will be used to automatically assign a purchase order number that will be given to the vendor. Departments utilizing a field purchase order are responsible for completing a requisition.

C. Improper use

For expenditures greater than $100.00, the issuance of two or more Field Purchase Orders to accomplish a purchase is prohibited.

EMERGENCY PURCHASES

A. Definition

A purchase of materials, supplies, or services for an emergency situation.

B. Purpose

Emergency purchases will be authorized by the City Manager, Department Directors, or Purchasing Administrator when the normal functions of City operations would be restricted by submitting a standard requisition. Emergency purchase orders may also be used when property, equipment, or life are endangered by unexpected circumstances.

C. Procedure

To request an emergency purchase order, the Department shall contact the Purchasing and Procurement Division and explain the nature of the request or emergency. The Department will obtain a purchase order number in the same manner as initiating a field purchase order. The Department will give the emergency purchase order number to the vendor. Vendors shall provide the Department with a sale receipt, ticket, or invoice at the time of the purchase. The Department shall submit a normal requisition, as soon as possible, and the vendor's sales receipt, ticket, or invoice shall be forwarded to the Purchasing and Procurement Division. The Department shall fully explain the reason for the emergency purchase order when submitting the requisition.

D. Making an emergency purchase on weekends, holidays, or after hours

During weekends, holidays, or after normal business hours, the Department will follow the procedure set forth in Section C above. (An emergency purchase order, however, will not be available for use at the time of the transaction with the vendor.) During the next regular workday, the Department shall contact and inform the Purchasing and Procurement Division of the emergency purchase.

E. Emergency purchases in excess of the $25,000 Bid Threshold Amount

An emergency purchase in excess of the $25,000 Bid Threshold Amount must receive prior approval by the City Manager or Assistant City Manager. Subsequently, the City Council must formally approve the emergency purchase.

F. General

Departments shall make every effort to purchase emergency supplies, materials, and services at the lowest cost.

QUOTATIONS AND BIDS

A. Quotations

All Departments are responsible for securing quotations prior to submitting requisitions for supplies, materials, and services that are "not subject" to the formal bid process, RFP process, or other requirements set forth in the Purchasing Policy and Purchasing Ordinance. Requisitions will be submitted by the Departments as provided in this Manual. The Purchasing and Procurement Division is available to assist Departments with a list of sources for quotations. The number of quotations required on all requisitions are as follows:

1. For each item.

Requisition Amount	Number of quotations required
$0 - $500.00	1 or more
$500.01 - $2,500.00	2 or more
$2,500.01 - $25,000.00	3 or more (written quotations)

2. Requisition for multiple items.

Required quotations for multiple item requisitions may be based on the above schedule for the total dollar amount of the requisition or on a line item basis.

Example:
The following is an example of a multiple item requisition and the number of quotes required if using line item quotes:

Item	Quantity	Description	Unit Price	Total	Required Quotes
1.	1	widget	99.00	99.00	1 or more
2.	2	widget removers	450.00	900.00	1 or more
3.	5	widget tools	600.00	3,000.00	2 or more
4.	1	widget maker	5,001.00	5,001.00	3 or more (written)
5.	5	widget maker	5,001.00	25,003.00	See Below

Since the total cost of item 5 exceeds the $25,000 Bid Threshold Amount, this item requires a formal bid. See following Section on Bids.

The number of quotations may vary based on the number of suppliers, time constraints, and other information or factors.

If quotation sources cannot be identified by the Department, the Purchasing and Procurement Division should be contacted for assistance. If required quotations cannot be obtained, an advertisement may be placed in a newspaper of general circulation, describing the item(s) for which quotations are being requested. The advertisement must be placed not less than seven (7) days prior to placing an order for the item(s). If the advertisement process does not provide the number of quotations required, the Purchasing and Procurement Division shall have authority to approve the requisition.

B. Purchases exempt from quotation requirements.

1. Emergency Purchases
2. Sole Source Items
3. Temporary Labor (If State Contract Vendor cannot produce a suitable candidate for a temporary labor position).

C. Sole Source Items

Sole Source items are any materials, supplies, or services that can only be obtained from one vendor or manufacturer, eliminating any possibility of securing a second competitive quote.

When it is determined that certain materials, supplies, or services are only available from a sole source, every effort must be made by the Department to secure documentation of sole source availability from the supplier, vendor, or manufacturer.

D. Bids

Any single or multiple item purchase in excess of the $25,000 Bid Threshold Amount requires a formal bid, a request for proposal.

Purchases utilizing competitive bids from other government entities are not subject to the bid threshold requirements (See Section 2.1.1.(c)5, Ordinance No. 2008-7958) – The City Manager or his designated representative may approve the purchase of commodities or contractual services utilizing competitive bids from other governmental entities including but not limited to federal, state, and local government entities.

E. Pre-qualification of Bidders/Proposers

Pre-qualification is typically a two-step process utilizing an RFP (Request for Proposals) or RFQ (Request for Qualifications) to determine if a vendor or group of vendors is qualified to bid on or submit a proposal for specific items or services. The Request for Qualifications would be solicited in the same manner as a Bid or RFP and then evaluated for specific criteria relative to the vendor being capable of providing the items or services. The vendors meeting the evaluation criteria for the Request for Qualifications would be the only vendors allowed to participate in the final Bid or RFP Process. The Request for Qualifications process is usually reserved for complex materials, supplies, or services.

Requests for bids and requests for which are in the form of an “Invitation to Bid-” “Request for Proposals,” or “Request for Qualifications” shall provide:

1. Bid/Proposals package/envelope must be sealed when returned to the City;
2. The time, date, and place for receiving bids/proposals;
3. The time, date, and place for opening bids/proposals;
4. A complete description of the commodity desired including specifications and quantity desired. (Not required for request for proposals.);
5. No changes of any kind will be allowed unless stated as an alternate proposal;
6. Bids must specify any and all warranties required;
7. Bids must provide delivery date information;
8. Bid pricing must include delivery to the City of Jacksonville Beach, Florida;
9. Bids/Proposals must be plainly marked with the bid number, bid title, and date and time of opening on the outside of sealed bid envelope.
10. The City reserves the right to accept or reject any or all bids, to waive irregularities or technicalities, and to accept any bid deemed to be in the best interest of the City.
11. Bid/Proposals shall contain a current Anti-Collusion Affidavit.

F. Bid/Proposal Advertisements

Bids must be advertised not less than seven (7) days and not more than sixty (60) days in advance of a Bid/Proposal opening date.

G. Bid Openings

Bids are normally opened on Wednesdays at 2:00 p.m. in the Operations and Maintenance Facility Conference Room by the Purchasing Administrator or a designee. Bid openings will be witnessed by a City employee who is not assigned to the Purchasing and Procurement Division.

H. Bonds

1. Bid Bond

A Bid Bond may be required on construction or other complex projects. If a vendor’s bid is selected and the vendor withdraws the bid, the vendor shall forfeit the Bid Bond to the City. Bid Bonds are typically five percent (5%) of the total contract amount.

2. Performance and Payment Bond

A Performance and Payment Bond may be required on the bidder(s) for construction or other complex projects. The Performance and Payment Bond, if required, shall be one hundred percent (100%) of the project contract amount and shall be in the form of a Corporate Surety Bond from a company licensed to do business in the State of Florida. The Bond shall guarantee the full and faithful performance of the bidders' contract obligations. Bond requirements may be waived by the City Manager.

I. Bid Tabulations and Recommendations

Subsequent to the bid opening, bids will be examined and evaluated for price and compliance with specifications by the Department and the Purchasing Administrator. Bids will be evaluated, tabulated, and a written recommendation will be prepared and sent to the City Manager for approval and inclusion on a City Council Agenda.

J. Bid Award

The Council may reject or award the bid subject to each Council member's opinion, to legal interpretations or rulings, and pursuant to the City's Purchasing Ordinance and Purchasing Policies.

K. Bid/Proposal Protest

1. Protest of Award.

Any actual bidder or proposer who perceives themselves aggrieved in connection with the recommended award of a bid or proposal may protest to the Purchasing Administrator. A written notice of intent to file a protest shall be filed with the Purchasing Administrator within three (3) days after receipt by the bidder or proposer of the Bid Award Notice from the Purchasing Administrator. The receipt by proposer of such notice shall be confirmed by the City by facsimile or electronic mail or U.S. mail, return receipt requested. No time will be added to the above limits for service by mail.

A notice of intent to file a protest is considered filed when received in writing by the Purchasing Administrator. No time will be added to the above limits for service by mail.

In computing the period of time for any notices or other documents prescribed or required by this section, the day of receipt of such notice or other document shall not be included. The last day of the time period shall be included in calculating the time period unless it is a Saturday, Sunday or legal holiday. In those cases the time period shall run until the end of the next day which is neither a Saturday, Sunday or legal holiday. Intermediate Saturdays, Sundays and legal holidays shall be excluded in the computation of the time for filing.

A written protest based on any of the foregoing must be submitted to the Purchasing Administrator within five (5) days after the date the notice of intent to file a protest.

Written protests shall contain the following information:

a. Name of the petitioner, address and phone number, and fax number;
b. Name of the petitioner's representative, if applicable;
c. Name and bid number of the solicitation;
d. A statement of the specific facts and/or law upon which the protest of the solicitation or the award is based, and shall include all pertinent documents and evidence and shall be submitted with the written protest.
e. A statement as to the relief to which the petitioner deems itself entitled, or the remedy requested.

The written protest shall form the basis for review of the protest by the City and no facts, grounds, documentation or evidence not contained in the protester's submission to the Purchasing Administrator at the time of filing the protest shall be permitted in the consideration of the written protest. In addition, the written protest may not challenge the relative weight of the evaluation criteria or the formula for assigning points in making an award determination.

2. Protest Process

Upon receipt of a written protest filed the City shall not proceed further with the award of the bid or proposal until the protest is resolved unless the City Manager makes a written determination that the solicitation process or the bid or proposal award must be continued without delay in order to avoid an immediate and serious danger to the public health, safety or welfare.

Within ten (10) days of the date of receipt of the protest, the City Manager or his designee, shall attempt to settle or resolve the protest. A decision regarding the protest will be rendered in writing and shall state the reasons for the action taken.

A copy of the decision regarding the protest shall be mailed or otherwise furnished immediately to the protestor. The decision of the City Manager or his designee shall be final and conclusive unless the protestor files a written appeal with the City Council within three days after the date of the decision. The appeal shall be in writing and shall state with specificity the grounds therefore and also the action requested of the City. The decision of the City Council shall be final.

Failure to follow the protest procedures or failure to meet any deadline set forth herein shall automatically nullify any protest or claim brought by an aggrieved bidder/proposer.

STOREROOM PROCEDURES

A. Definition

The Storeroom Division is the central warehousing facility for the City. Inventory levels are maintained for items that are required on a routine and emergency basis for all City Departments. Inventory levels are established and maintained for normal maintenance schedules. The Purchasing and Procurement Division and the Storeroom Division must be notified in advance if existing inventory levels need to be increased. Information for all inventory items is available on the IBM I520 Computer System.

B. Stock Requisitioning

All inventory items may now be requisitioned by an on-line process. Employee training for the inventory requisition process is available from the Purchasing and Procurement Division. A manual process is still available during power outages, disasters, or for Departments that have not fully implemented the on-line process. The Storeroom is responsible for accurately issuing all inventory items.

C. Receipt of Materials

The Storeroom is responsible for insuring that all materials and supplies are received, accounted, inventoried, documented, verified for accuracy, properly stored, and issued to the Departments. The Storeroom's documentation of receipts provides the back-up documentation for the City to authorize payments to vendors.

D. Annual Inventory

It is the responsibility of the Storeroom Division to conduct a complete inventory count at least once each year.

INSPECTION AND TESTING

A. Responsibility

The Purchasing and Procurement Division and the City Departments shall inspect or have inspected, all materials, supplies, equipment, or contractual services received by the City to determine conformance with the specifications as set forth in the purchase order.

B. Outside Testing

When an outside testing laboratory is required, the Purchasing and Procurement Division will make the necessary arrangements for the testing.

SURPLUS/SALVAGED CITY PROPERTY

A. Disposal

Surplus and salvaged material and equipment may be disposed of:

1. By transferring to other Departments;
2. By trading in on new equipment or materials;
3. By auctioning or selling to the general public when authorized by the Council;
4. By junking when deemed unfit for sale; or
5. By donating to other governmental agencies as set forth in the Purchasing Ordinance.

B. Reporting

Each Department shall report all surplus or obsolete materials and equipment on the Fixed Asset Obsolete Form.

EXHIBITS

A. Purchase Order Form

B. Petty Cash Voucher

C. Fixed Asset Obsolete Form

PURCHASING CARD PROGRAM

SECTION I - INTRODUCTION

The City's Purchasing Card Program is designed to improve efficiency in processing small purchasing transactions and to reduce the amount of reimbursable out-of-pocket expenses incurred by employees as they conduct City business. The City has selected the VISA Card for the Program, which is widely accepted by most vendors.

This Program allows a cardholder to purchase approved commodities, materials, supplies, and services directly from vendors. Each Purchasing Card is issued to a named City employee and the "City of Jacksonville Beach Official Use Only" is on the card.

The Purchasing and Procurement Division and the Finance Department will monitor the performance of the Program. All questions or concerns about the Program should be directed to:

Procurement related:	Purchasing Administrator
Accounting related:	Finance Officer

A. <u>Purpose of Policies and Procedures</u>

1. To provide an efficient method of purchasing and paying for goods, materials, supplies, and services for official City business.

2. To reduce the use of personal currency by City employees for reimbursable expenditures.

3. To ensure the use of Purchasing Cards is in accordance with the City's ordinances, policies, and procedures.

4. To reduce the time the Accounts Payable Division is required to process payments.

5. To ensure that the City is not subject to legal liability as a result of inappropriate use of a card.

6. To provide for disciplinary action if a card is misused.

The following are the minimum standards for the Program. Departments may establish additional controls to monitor and comply with these Policies and Procedures.

B. The Program

The Purchasing Card Program simplifies the procurement and disbursement process for expenditures. Purchasing Card responsibilities are delegated to the individual Departments which enables a Cardholder to use a card for authorized City expenditures.

When the point-of-sale supplier requests a purchase authorization, the VISA Card System will check the transaction against the preset limits established by the City. Transactions are electronically approved or declined based on the authorization limit established by the City. The authorization limit may be adjusted periodically as needed and may include, but is not limited to, the following criteria:

Authorized Limits

Single Purchase	$1,000.00
Monthly Total	$2,500.00
Transactions/Day	10 (Total Transactions)
Transactions/Month	100 (Total Transactions)

The authorization process occurs through an electronic system that supports the Purchasing Card Program under the City's agreement with VISA Card. The Purchasing Card Administrator may adjust the authorization limits based on the purchasing needs of an individual Department or employee.

C. Responsibilities

The following are the responsibilities of employees, Divisions, and Departments that participate in the Purchasing Card Program:

Employee Cardholder

* Accept, retain, and secure the assigned Purchasing Card;
* Purchase only authorized City-related materials, supplies, and services;
* Receive and inspect all City-related materials, supplies, and services;
* Acquire and retain sales receipt for each purchase;
* Match purchase receipts with each monthly card statement;
* Review monthly statements for validity and correctness of all transactions;
* Identify and assist in handling any disputed charges;
* Review monthly charges, if required, with Department's Purchasing Card Representative;
* Notify Department's Purchasing Card Representative when a card is lost, stolen, or misplaced; and
* Inform vendors that all City purchases are tax-exempt (tax-exempt number is on each Purchasing Card).

Department Purchasing Card Representative
(Designated by Department Director)

* Receive and review consolidated monthly statements from VISA Card;
* Confirm that Department authorized all charges;
* Review monthly statements with Cardholders;
* Sign monthly statements authorizing charges;
* Verify the appropriateness of cost center codes (i.e. City 14 digit account number);
* Ensure spending limits for each employee are within established criteria and limits;
* Handle disputed items not resolved by Cardholder;
* Forward monthly statements, completed transmittal form, and receipts to Accounts Payable Division;
* Perform regular inspection of card possession by Cardholders;
* Confirm that appropriate receipts are attached to monthly statements;
* Obtain requisitions for monthly statements and obtain expenditure receipts from Cardholders;
* Notify Purchasing Card Administrator when approved monthly statements are not received;
* Notify Purchasing Card Administrator when a card is lost, stolen, or misplaced; and
* Verify monthly charges shown on the consolidated statement.

Department Director

* Request Purchasing Cards for designated employee(s);
* Designate one or more representatives who will be responsible for authorizing charges;
* Collect cards from Cardholders who are no longer employees;
* Collect Purchasing Card from employee when employee transfers to another department;
* Notify the Purchasing Card Administrator of lost, stolen, misplaced, or terminated cards;
* Appoint a Departmental Purchasing Card Representative; and
* Department Director will be responsible for all purchases made by Department employees.

Purchasing Card Administrator
(Appointed by Finance Officer)

* Approve and disapprove requests for Purchasing Cards;
* Coordinate issuance and cancellation of cards;
* Coordinate program policies and procedures;
* Participate in ongoing program reviews;
* Participate in resolving billing disputes;

* Maintain the Policy and any Cardholder Guides or Manuals; and
* Adjust credit limits for individual Cardholders when requested and approved by the Finance Officer and the Department Director.

Purchasing and Procurement Division

* Resolve disputes;
* Pursue supplier discount opportunities;
* Evaluate Purchasing Card feedback from suppliers;
* Coordinate and maintain internal controls;
* Perform physical audits of card possession by Cardholders;
* Make code changes when required;
* File and store statements; and
* Administer 1099 reporting.

Accounting Division

* Review, approve, and authorize payment of consolidated monthly statements.

Internal Audit Division

* Conduct periodic operational and compliance audits.

SECTION II- POLICIES AND PROCEDURES

A. Assignment and Control of Purchasing Card

1. Requests for and issuance of Purchasing Cards

    a. Requests for new Purchasing Cards or requests for changes to existing monthly Purchasing Card Limits shall be made by submitting a completed Purchasing Card Request Form (see attachment 1) to the Purchasing Card Administrator.

    b. All requests for new Purchasing Cards or requests for changes to existing monthly Purchasing Card Limits must be approved and signed by the Department Director.

    c. If approved by the Purchasing Card Administrator, Cards will be issued to individual employees.

    d. The Purchasing Card will be embossed with the employee's name, City's name, and expiration date. The City's sales tax exemption number will also be preprinted on each Purchasing Card. The company issuing the Purchasing Card will not be given individual employee information, other than the employee's work address. No credit records, social security numbers, or other personal employee information will be given to the company that issues the Purchasing Card.

    e. When the Purchasing Card Administrator receives the Purchasing Card from the issuing company, the employee will take possession of the card and sign a Purchasing Card Issue Form (see Attachment 4). The employee will be given a copy of the Purchasing Card Policies and Procedures and will be given an oral review of the Program. Prior to use, each card must be activated by the Cardholder according to instructions printed on the card.

2. Lost, Stolen, and Misplaced Purchasing Cards

    a. In the event a Purchasing Card is lost, stolen, or misplaced, the Cardholder shall immediately notify the issuing company and the Purchasing Card Administrator.

    b. The Cardholder shall be responsible for reporting all information necessary to reduce the City's liability for a lost, stolen, or misplaced card.

3. Termination or Transfer of Cardholder

a. When employment is terminated or the employee is transferred to another Department, the Department Director shall take possession of the Purchasing Card, destroy the Purchasing Card (cut in half), and submit the Purchasing Card pieces to the Purchasing Card Administrator.

b. In the event the Department Director is unable to take possession of a Purchasing Card when an employee terminates or transfers, the Director shall immediately notify the Purchasing Card Administrator by telephone followed by a written notification. The Purchasing Card Administrator will be responsible for cancellation of the Purchasing Card.

B. Use of Purchasing Card

1. Use of Card Restricted to Cardholder

The Purchasing Card may only be used by the employee who was assigned the card. No other employee or individual is authorized to use the card. The Cardholder shall be responsible and accountable for all transactions that occur on the assigned card. A violation of this policy will result in disciplinary action for the Cardholder.

Upon receipt of an assigned Purchasing Card, the employee shall sign the card.

2. Use of Card for City Purchases Only

The Purchasing Card may only be used for City authorized purchases.

A Purchasing Card may not be used for any personal use whatsoever. An error in using the Purchasing Card for personal use will require immediate reimbursement by the Cardholder to the City and may result in disciplinary action within the City's Personnel Policies and Procedures and any existing Collective Bargaining Agreement.

3. Spending Limits

a. Requests for spending limit changes shall be initiated by a Purchasing Card Request Form and a written memo from the Department Director to the Purchasing Card Administrator. The Purchasing Card Administrator shall submit the request to the City Manager for review and approval.

b. The City Manager may approve higher limits for individual employees and Departments. Employees shall have a $2,500 per month limit, but a Department Director may impose additional limitations.

4. Prohibited Uses of Purchasing Cards

The following types of items may **NOT** be purchased with a Purchasing Card:

a. Gasoline, fuel, or oil (unless for City vehicle)
b. Vehicle repairs (unless for City vehicle);
c. Cash advances; and
d. Telephone calls.

C. Procedures For Making and Paying For Purchases

1. Documentation of Over-The-Counter Purchases

a. When an over-the-counter purchase is made, the Cardholder must obtain and retain the customer's copy of the charge receipt.
b. The charge receipt will be retained either by the Cardholder or by the Department's Purchasing Card Representative.

2. Telephone Orders

When placing a telephone order, the Cardholder shall provide the tax-exempt number (located on the Purchasing Card) and record the date, amount of transaction, confirmation numbers, and sales representative's names. This information shall be used to reconcile monthly purchase statements. The packing slip, invoice, or other documentation must be submitted by the Cardholder to the Department's Purchasing Card Representative with the monthly Cardholder Statement.

3. Sales and Use Taxes

The City is tax-exempt, and therefore, is not required to pay any State of Florida (and generally other States') sales and use tax, even when the purchase is made with the Purchasing Card. If the vendor charges sales or use tax, the Cardholder or the Department's Purchasing Card Representative must contact the vendor and obtain a Purchasing Card credit equal to the amount of the sales or use tax.

The City's Sales Tax exemption number is printed on the face of the Purchasing Card. If employees have problems with any merchant or vendor regarding sales or any other tax, the employee should contact the Purchasing Card Administrator.

4. Missing Documentation

If a Cardholder does not have documentation of a transaction, the Cardholder shall submit a written description of the purchase to the Department Purchasing Card Representative. Incidents of missing documentation are not acceptable and may result in the cancellation of an employee's Purchasing Card.

5. <u>Payment and Invoice Procedures</u>

a. The Purchasing Card Company will mail an individual billing statement to the Cardholder's Department and one consolidated Statement of Account for all City Cardholders to the Accounting Division. This Statement of Account will list all transactions processed during the previous billing cycle (usually 30 days). If no purchases were made on a Purchasing Card during the billing cycle, no Statement of Account will be generated for the Cardholder unless credit adjustments for previously billed transactions have been processed and posted to the account during that cycle.

b. The Cardholder shall review the monthly statement and note any errors, omissions, or disputes. The total dollar amount for each account number to be charged should be listed. The individual purchase and account number should not be listed on the requisition for payment sent to the Accounting Division. All purchases should be consolidated which apply to each account number to be charged. A requisition will then be entered by the Department's Purchasing Card Representative. By entering the requisition, the Department's Purchasing Card Representative is certifying that all charges are appropriate, authorized, and are confirmed by receipts.

c. The requisition, monthly statement for each cardholder, and original receipts should be forwarded to the Purchasing and Procurement Division within five (5) working days after receipt. If the statement is not received in the Purchasing and Procurement Division within five (5) days, the Purchasing and Procurement Division will pay the statement and charge any transactions to the card's default account number. A late transaction processing charge may be added to late submittals.

d. The Purchasing and Procurement Division will ensure Purchasing Card charges are paid in a timely manner. The consolidated Statement of Account received by the Purchasing and Procurement Division will be reconciled against the individual Cardholder statements received from each Department's Purchasing Card Representative. The Department Purchasing Card Representative will be notified when individual statements are not received on time. At the discretion of the Finance Officer, failure to meet the five workday deadline may result in the cancellation of a Purchasing Card.

D. <u>Disputes</u>

1. In the event items purchased with a Purchasing Card are defective, the Cardholder must return the items to the vendor for replacement or credit. If a faulty service is paid for with Purchasing Card, the vendor must be notified and instructed to correct the situation or provide a credit. If the vendor refuses to replace or correct the faulty item or service, the purchase will be considered in dispute. If the quantity of items or service received is less than the invoice or actual billing, then the transaction shall be disputed.

2. If a vendor charges the Cardholder a sales or use tax on a purchase, and the Cardholder is unable to obtain a credit for the amount of the tax, then the transaction shall be disputed.

3. A disputed item must be explained with a note on the Cardholder's Statement of Account before the Statement is forwarded to the Accounting Division.

4. It is essential that disputes are handled in a timely manner and documentation is established by the Cardholder with assistance of the Department's Purchasing Card Representative.

5. A dispute occurs when a Cardholder questions a transaction that has been charged to the Cardholder's account. The following steps must be taken when there is a dispute:

    a. The Cardholder contacts the merchant or vendor about the transaction and supplies the necessary information to begin a resolution process;

    b. The Cardholder completes the Dispute Form (see Attachment 3), explains the reason for the dispute, and faxes the form to VISA Card. A copy of the Statement of Account will also be sent to VISA Card if the item has been posted to the account. VISA Card will then place the transaction into a disputed status.

    c. If the problem is resolved between the merchant or vendor and the Cardholder, the Cardholder shall write the solution agreed upon on the bottom of the Dispute Form that was faxed to VISA Card. If an agreement cannot be reached, the following steps shall be taken:

        1). After the item has been entered as a dispute, VISA Card will determine the responsible party by researching the transaction including requesting a copy of the sales receipt if necessary. When responsibility for the purchase is determined, the dispute will be settled on-line.

        2). If the Cardholder is responsible for the purchase, the dispute is settled in favor of VISA Card and no further actions are required. If the Cardholder is not responsible for the purchase, the dispute is settled in favor of the Cardholder and a credit will be issued to the City.

        3). If there continues to be problems with a particular merchant or vendor, the Cardholder shall notify the Purchasing Card Administrator.

E. Review of Purchases by Department Purchasing Card Representative

1. The Department Purchasing Card Representatives are required to review each Purchasing Card expenditure (items purchased, amount, and merchant or vendor) to ensure the goods or services were necessary, and for official City use.

2. When purchases are questioned, the Department Director or the Department Purchasing Card Representative will be responsible for resolving the matter with the Cardholder. If the Department Director is not satisfied that the purchase was necessary or was not for official City use, the Cardholder must provide either a credit voucher proving the items were returned for credit or the employee's personal check made payable to the City of Jacksonville Beach for the full amount of the purchase, including any applicable taxes, shall be given to the Purchasing and Procurement Division within one week with a written explanation of why the violation occurred and the action taken to prevent future reoccurrence. The Purchasing and Procurement Division will forward the employee's personal check to the cashiers with the account number to be credited.

3. Misuse of a Purchasing Card may result in the revocation of the card and termination of employment.

F. General Requirements and Information

1. Cardholders Shall:

- Not allow other individuals to use their assigned Purchasing Card;
- Not accept cash in lieu of a credit to their Purchasing Card Account;
- Immediately notify the Department Purchasing Card Representative of a lost or stolen Purchasing Card at the first opportunity during normal business hours;
- Immediately report a lost or stolen Purchasing Card to VISA Card;
- Determine if the intended purchase is within spending and vendor guidelines;
- Provide the merchant or vendor with the Purchasing Card and for purchases made by telephone, provide the vendor with the account number and Purchasing Card expiration date;
- Obtain a copy of the charge slip, sales receipt, or packing slip;
- Reconcile to the Cardholders statement each month;

- Provide Cardholder Statement receipts to Department Purchasing Card Representative;

- Provide Department Purchasing Card Representative with a copy of the order blank or description of the order when purchase is made by telephone or fax; and

- Notify Departmental Purchasing Card Representative of alternate account number to be charged if different from the account assigned to the Purchasing Cardholder.

2. Disputes and Billing Errors

The Cardholder should always attempt to resolve any disputes or billing errors directly with the merchant or Vendor. In most cases, the merchant or vendor will issue a credit. If an agreement cannot be reached with the merchant or vendor, the Cardholder should contact VISA Card. VISA Card may request that the Cardholder mail or fax a signed Dispute Form (see Attachment 3) to document the reason for the dispute.

3. Credits

The merchant or vendor should issue a credit to the Cardholder's account for any items that have been returned. The credit should appear on a subsequent statement. ***Under no circumstances shall the Cardholder accept cash in lieu of a credit to the Purchasing Card Account.***

4. Non-acceptance of Purchasing Card

There may be situations when a merchant or vendor receives a "decline" message when processing a Purchasing Card transaction. In the event the Cardholder does not know the reason for the decline of a card, contact VISA Card.

5. Purchasing Card/Account Number Security and Storage

Cardholders should always keep the Purchasing Card secure and carried in a safe place. The Purchasing Card should be maintained in a secure location and the account number shall be carefully guarded. The only person authorized to use the Purchasing Card is the employee listed on the card. The Purchasing Card shall not be given to another person for any reason.

6. Vendor Participation

If an existing merchant or vendor does not accept the Purchasing Card, the Purchasing and Procurement Division will assist the Cardholder in recruiting the merchant or vendor to take the necessary steps to qualify for the program. Cardholders should inform the Department's Purchasing Card Representative when merchants and vendors do not accept the card.

7. Customer Service

VISA Card Customer Service is available 24 hours a day, 365 days a year for:

- Reporting lost or stolen cards;
- Responding to disputes or billing errors; and
- Responding to requests for Account information.

ATTACHMENTS

1. Purchasing Card Request Form
2. Restricted and Prohibited Use Schedule
3. Cardholder Statement of Disputed Item
4. Purchasing Card Issue Form

PURCHASING CARD REQUEST FORM

Requirements

The Purchasing Card shall only be used to make purchases at the request of and for the legitimate business benefit of the City of Jacksonville Beach.

The Purchasing Card must be used in accordance with the Purchasing Card Program Cardholder Manual and the Purchasing Card Policies and Procedures established by the City of Jacksonville Beach. Violations of these requirements may result in revocation of Purchasing Card privileges and disciplinary action, up to and including termination of employment. Employees who improperly use the Purchasing Card shall reimburse the City for all costs associated with such improper use.

Requested Monthly Credit Limit: ______________________________

Employee Name: ______________________________
(Print Name)

Employee Signature: ______________________________

Department Director Approval: ______________________________

R = state recommends agencies restrict these MCCs
P = Prohibited by Contract

ATTACHMENT 2

Restricted And Prohibited Use Schedule

1	4829	P	WIRE TRANSFER MONEY ORDER
2	5172	R	PETROLEUM AND PETROLEUM PRODUCTS
3	5309	R	DUTY FREE STORES
4	5541	R	SERVICE STATIONS
5	5542	R	AUTOMATED FUEL DISPENSERS
6	5812	R	OTHER RESTAURANTS
7	5813	R	BARS/TAVERNS/LOUNGES/DISCOS
8	5814	R	FAST FOOD RESTAURANTS
9	5921	R	PKG. STORES/BEER/WINE/LIQUOR
10	5933	R	PAWN SHOPS
11	5944	R	JEWELRY STORES
12	5947	R	GIFT
13	5963	R	DIRECT SELL/DOOR-TO-DOOR
14	5972	R	STAMP & COIN STORES
15	5973	R	RELIGIOUS GOODS STORES
16	5977	R	COSMETIC STORES
17	5993	R	CIGAR STORES/STANDS
18	5996	R	SWIMMING POOLS/SALES/SERV
19	5997	R	ELEC RAZOR STORES/SALE/SERV
20	6010	P	FINANCIAL INST/MANUAL CASH
21	6011	P	FINANCIAL INST/AUTO CASH
22	6012	P	FINANCIAL INST/MERCHANDISE
23	6211	P	SECURITY BROKERS/DEALERS
24	6300	R	INSURANCE SALES/UNDERWRITE
25	6381	R	INSURANCE PREMIUMS
26	6399	R	INSURANCE - DEFAULT
27	7012	R	TIMESHARES
28	7032	R	SPORT/RECREATIONAL CAMPS
29	7033	R	TRAILER PARKS/CAMP SITES
30	7230	R	BARBER/BEAUTY SHOPS
31	7261	R	FUNERAL SERVICE/CREMATORIES
32	7273	R	DATING & ESCORT SERVICES
33	7297	R	MASSAGE PARLORS
34	7298	R	HEALTH & BEAUTY SPAS
35	7832	R	MOTION PICTURE THEATRES
36	7911	R	DANCE HALLS/STUDIOS/SCHOOLS
37	7922	R	THEATRICAL PRODUCERS
38	7929	R	BANDS/ORCHESTRAS/ENTERTAIN
39	7932	R	BILLIARD/POOL ESTABLISHMENT
40	7933	R	BOWLING ALLEYS
41	7941	R	COMMERCIAL/PRO SPORTS
42	7991	R	TOURIST ATTRACTIONS AND XHBT
43	7992	R	PUBLIC GOLF COURSES
44	7993	R	VIDEO AMUSEMENT GAME SUPPLY
45	7994	R	VIDEO GAME ARCADES/ESTABLISH
46	7995	R	BETTING/TRACK/CASINO/LOTTO
47	7996	R	AMUSEMENT PARKS/CIRCUS
48	7997	R	MEMBER CLUBS/SPORT/REC/GOLF
49	7998	R	AQUARIUMS/SEAQUARIUMS
50	7999	R	AMUSEMENT/REC SERV - DEF
51	8351	R	CHILD CARE SERVICES
52	8398	R	CHARITABLE/SOC SERVICE ORGS
53	8641	R	CIVIC/SOCIAL/FRATERNAL ASSC
54	8651	R	POLITICAL ORGANIZATIONS
55	8661	R	RELIGIOUS ORGANIZATIONS
56	8675	R	AUTO ASSOCIATIONS
57	9211	R	COURT COSTS/ALIMONY/SUPPORT
58	9222	R	FINES
59	9223	R	BAIL AND BOND PAYMENTS
60	9311	R	TAX PAYMENTS

DMS Revised Aug 1998 to include May 98 Visa Revisions

Purchase Form

ATTACHMENT 3

Authorized by:
Cardholder Signature:

VISA Card

Phone 1-800-538-8788 Fax 1-800-253-5846 Attn: Commercial Card Svcs

Cardholder Statement of Disputed Item

Business Name: ____________________
Cardholder Name: ____________________
Cardholder Account Number: ____________________

Statement Date	Transaction Date	Merchant Name/Description
Amount	Posting Date	Reference Number

Check the description most appropriate to your dispute. If you have any questions, contact Bank of America at 1-800-538-8788.

_____ 1. **Alteration of Amount:**
The amount of the sales draft has been altered from $ __________ to $ __________
(Please include copy of sales draft)

_____ 2. **Unauthorized Mail or Phone Order:**
I certify the charge listed above was not authorized by me or any person authorized by me to use this account. I have not ordered merchandise by phone or mail, or received goods and services as represented above.

_____ 3. **Cardholder Dispute:**
I did participate in the above transaction, however, I dispute the entire charge, or a portion, in the amount of $ __________ because: ____________________

____

____

_____ 4. **Credit Not Received:**
The merchant has issued me a credit slip for the transaction listed above; however, the credit has not posted to my account. The date on the voucher is between 30 and 90 days old. (Please include a copy of the credit voucher.)

_____ 5. **Imprinting of Multiple Slips:**
The above transaction represents multiple billing to my account. I only authorized one charge from this merchant for $ __________ I am still in possession of my card.

_____ 6. **Merchandise Not Received:**
My account has been charged for the above transaction, but I have not received this Merchandise. I have contacted the merchant.

_____ 7. **Merchandise Not Received:**
My account has been charged for the above transaction, but I have since contacted this merchant and canceled the order. I will refuse delivery should the merchandise still be sent.

_____ 8. **Merchandise Returned:**
My account has been charged for the transaction listed above, but the merchandise has been returned. Provide a description of the circumstances. (Please include postal receipt if applicable.)

_____ 9. **Inadequate Description/Unrecognized Charge:**
I do not recognize this charge, Please supply a copy of the sales draft for my review.

_____ 10. **I am no longer disputing this charge.**

PURCHASING CARD ISSUE FORM

Employee Name: ______________________________
(Please Print)

Employment Classification: ______________________________
(Please Print)

Department: ______________________________
(Please Print)

Division: ______________________________
(Please Print)

Single Purchase Limit: $ ______________________________

Monthly Limit: $ ______________________________

Purchasing Card Account Number: ______________________________

* *

Approvals:

Department Director: ______________________________ Date: ______________
(Signature)

Purchasing Card Administrator: ______________________________ Date: ______________
(Signature)

* *

I certify that I have received a copy of the Purchasing Manual and I understand and agree to the terms set forth therein. I agree to relinquish my Purchasing Card to the City of Jacksonville Beach when requested to do so and upon termination or transfer of employment. I understand that failure to use a Purchasing Card in accordance with all rules and regulations may require relinquishing the Card and may result in disciplinary action.

I UNDERSTAND THAT A PURCHASING CARD CANNOT BE USED FOR ANY PERSONAL USE WHATSOEVER, AND ANY SUCH USE WILL REQUIRE IMMEDIATE REIMBURSEMENT TO THE CITY AND WILL RESULT IN DISCIPLINARY ACTION

JACKSONVILLE BEACH

OFFICE OF THE CITY MANAGER

City of
Jacksonville Beach
City Hall
11 North Third Street
Jacksonville Beach
FL 32250
Phone: 904.247.6263
Fax: 904.247.6169

www.jacksonvillebeach.org

PURCHASING MANUAL DIRECTIVES

Number: 2019-01

Supersedes: N/A

Issued: May 15, 2019

Effective: July 1, 2019

From: Mike Staffopoulos, City Manager

PURCHASING MANUAL DIRECTIVES

Purpose

The City's Purchasing Manual is to provide guidance to all employees on the appropriate practices, documentation, and approvals necessary to purchase services and goods on behalf of the City. From time to time, clarifications are necessary to remove ambiguity in the intent of this document.

Policy

The term "designated representative" shall mean the City's Property & Procurement Officer. The City Manager or Deputy City Manager shall be available in the absence of the Property & Procurement Officer, or if there is a dispute between the designated representative and a Department Director that requires Administrative input for resolution.

The term "governmental entities" shall mean any other local, state or federal government agency, to include agencies with taxing authority or constitutionally sworn officers, or such agency as approved by the City Manager or his designated representative.

Commodities or contractual services available only from a single source may be excepted from the competitive-solicitation requirements for the following reasons:

- The City is standardizing equipment around one supplier for compatibility of ancillary equipment or controls, warehousing, and employee training/familiarity;

- There is only one authorized supplier or representative for a particular good or service, as documented by a letter on corporate letterhead, signed by an authorized agent of the company. Such documentation is required to be updated annually. Provision of this documentation shall supersede both the City's and State's requirement to electronically post a description of the commodity or contractual service for at least 7 business days.

Expenditures for commodities or contractual services exceeding a bid threshold amount of twenty-five thousand dollars ($25,000) in the aggregate for an individual product, or in the aggregate from a single source, shall require City Council approval.

Enforcement. All purchasing after July 1, 2019 shall comply with this Directive, and shall be enforced by the City Manager or his designated representative.

PURCHASING MANUAL DIRECTIVE	
Number:	2024-01
Supersedes:	N/A
Issued:	September 30, 2024
Effective	September 30, 2024
From:	Mike Staffopoulos, City Manager Karen Nelson, DCM

Purpose
The City's Purchasing Manual is used to provide guidance to all employees on the appropriate practices, documentation, and approvals necessary to purchase services and goods on behalf of the City. From time to time, clarifications are necessary to remove ambiguity in the intent of this document.

Policy
The City is subject to the debarment and suspension regulations implemented by Executive Orders 12549 and 12689, 2 C.F.R. Part 180. The City shall not enter into an agreement for property or services with an entity or person who has been disqualified (suspended or debarred) from participation in Federal programs or activities, unless the Federal granting agency grants an exception.
The City shall take reasonable steps to determine whether any vendor, contractor or consultant is or has been excluded or disqualified from participating in such transaction.

Procedure
1. Prospective vendors will be required to complete a suspension and debarment certification form as part of a complete bid response.
2. Vendors will be required to complete a suspension and debarment certification form as part of the new vendor application.
3. Before a vendor will added to the financial software system, or any intent to award letters are issued, Finance staff will verify that prospective vendors are not included in either Federal or State suspended and debarred vendor lists.

Enforcement
All purchasing after September 27, 2024 shall comply with this Directive, and shall be enforced by the City Manager or their designated representative.

Attachments
Forms to be included in solicitation documents and new vendor applications

FORM TO BE INCLUDED WITH SOLICITATION DOCUMENTS:

FORM 14: SUSPENSION & DEPARMENT PURSUANT TO FLORIDA STATUTE §287.1351, Executive Orders 12549 and 12689, 2 C.F.R. Part 180

I,______________________________on behalf of __________________________ certify
Print Name and Title Company Name

that ____________________________________:
Company Name

A. The prospective Vendor certifies that it and its principals (subcontractors and suppliers):
   a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or involuntarily excluded by any Federal, State, County, City of Town or other government agency;
   b. Have not within (36 months) period preceding this time, been convicted of or had a civil judgement entered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal or State, City or Town of other local agency) transaction or contract; violation of Federal or State anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
   c. Are not presently indicated for otherwise criminally or civilly charged by a government entity (Federal, State or local) within commission of any of the offenses enumerated in paragraph (A)(2) of this certification; and
   d. Have not within (36) months period preceding this time, had one or more public contracts (Federal, State, City, or Town or other agency) terminated for cause or default.

B. Where the prospective Vendor is unable to certify to any of the statements in this certification, an authorized signatory to this proposal shall complete, sign and attach a detailed explanation.

__________________________________ _______________________________
Name and Position Date

____
Signature

____
Company Name

__________________________________ _______________________________
Street Address City, State and Zip Code

FORM TO BE INCLUDED WITH NEW VENDOR APPLICATIONS:

NEW VENDORS: SUSPENSION & DEPARMENT PURSUANT TO FLORIDA STATUTE §287.1351, Executive Orders 12549 and 12689, 2 C.F.R. Part 180

I,__________________________on behalf of _______________________ certify
Print Name and Title Company Name

that _________________________________:
Company Name

A. The prospective Vendor certifies that it and its principals (subcontractors and suppliers):
   a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or involuntarily excluded by any Federal, State, County, City of Town or other government agency;
   b. Have not within (36 months) period preceding this time, been convicted of or had a civil judgement entered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal or State, City or Town of other local agency) transaction or contract; violation of Federal or State anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
   c. Are not presently indicated for otherwise criminally or civilly charged by a government entity (Federal, State or local) within commission of any of the offenses enumerated in paragraph (A)(2) of this certification; and
   d. Have not within (36) months period preceding this time, had one or more public contracts (Federal, State, City, or Town or other agency) terminated for cause or default.

B. Where the prospective Vendor is unable to certify to any of the statements in this certification, an authorized signatory to this proposal shall complete, sign and attach a detailed explanation.

_________________________________ ______________________________
Name and Position Date

____
Signature

____
Company Name

_________________________________ ______________________________
Street Address City, State and Zip Code

Sec. 2-1. Purchase of materials, etc., in excess of specified amount; publication of notice for bids—Definitions.

The following definitions shall apply in this part:

Bid threshold means the dollar amount prescribed by ordinance where if it is known that an expenditure for commodities or contractual services will exceed this amount, the commodities or contractual services must have been competitively bid except for single source items and professional services.

City means the City of Jacksonville Beach, Florida.

Commodity means any of the various supplies, materials, or equipment purchased, leased or otherwise contracted for by the city.

Competitively award means to award contracts based on the submission of sealed bids in response to an invitation to bid or proposals submitted in response to a request for proposal or qualifications. This definition expressly covers contracts for construction management services, design/build contracts based on unit prices, and any other contract arrangement with a private sector contractor approved by city council.

Contractual service means the rendering by a contractor of its time and effort rather than the furnishing of specific commodities. The term applies only to those services rendered by individuals and firms who are independent contractors.

Invitation to bid means a written solicitation for competitive sealed bids with the title, date, and hour of bid opening designated and specifically defining the commodity, group of commodities, or services for which bids are sought.

Professional services means those services which include but shall not be limited to those within the scope of the practice of architecture, engineering, landscape architecture legal services, consultants, medical services, registered surveying and mapping services, etc.

Request for proposals or qualifications means a written solicitation for competitive sealed proposals with the title, date, and hour of the public opening designated. The request for proposal is used when the commodity, group of commodities, or contractual service required cannot be specifically defined.

Single source purchases means that commodities or contractual services available from a single source may be excepted from the competitive bid requirements if it is determined that such commodities or contractual services are available only from a single source and such determination is documented and/or deemed to be in the best interest of the city by the city council. Used commodities may also be purchased as a single source.

(Code 1955, § 2-3; Ord. No. 7158, § 1, 4-5-82; Ord. No. 97-7708, § 1, 5-5-97; Ord. No. 2004-7869, § 1, 2-2-04; Ord. No. 2006-7910, § 1, 2-20-06)

Sec. 2-1.1. Purchase procedures; contracts, etc.

(a) *Purchase procedure.* Unless authorized by the city council, before any expenditure for commodities or contractual services exceeding a bid threshold amount of twenty-five thousand dollars ($25,000.00) may be legally incurred by the city, a competitive award must be made. To make a competitive award, invitations to bid or requests for proposals/qualifications require that public notice be given by publication of a legal notice at least once in a newspaper of general circulation not less than seven (7) days prior to making any such purchase or awarding a contract therefore. The public notice must specify or describe clearly the kind, amount, and nature of such commodities, or contractual services intended to be purchased or contracted for by the city. This subsection shall apply to all purchases of commodities or contractual services except professional services.

(b) *Award of contract.* When the city has advertised to competitively award, the award must be made to the lowest responsive and responsible bidder. The lowest responsive and responsible bidder must be judged on the basis of price, conformance to specifications, bidders' qualifications including the bidders' past performance in such matters, quality and utility of services, supplies, materials or equipment offered and their adaptability to the required purpose and in the best interest of the public, each of the factors considered.

1. *Right to reject bid/proposals for commodities/contractual services.* The city shall reserve the right to reject any or all bids/proposals and such reservation shall be indicated in all advertising and invitations to bid/requests for proposal.

2. *Right to waive minor irregularities for commodities/contractual services.* The city shall reserve the right to waive any minor irregularities in an otherwise valid bid/proposal. Variations which are not minor cannot be waived.

3. *Bid modification for commodities/contractual services.* A bidder or offeror may not modify its bid after bid/proposal opening. Mistakes in an arithmetic extension of pricing may be corrected by the city.

(c) [*Applicability.*] The provisions of subsection (a) do not apply:

1. When the project is undertaken to replace, reconstruct or repair an existing facility damaged or destroyed by a sudden turn of events, such as an act of God, riot, fire, flood, accident or other urgent circumstances, and such damage or destruction creates:

   a. An immediate danger to the public health or safety;

   b. Other loss to public or private property which requires emergency government actions; or,

   c. An interruption of an essential government service.

2. When the government entity does not receive any responsive bids after a request to competitively award.

3. When single source purchases are approved by city council.

4. Purchases of electricity by the Florida Municipal Power Agency.

5. Purchases utilizing competitive bids from other government entities. The city manager or his designated representative may approve the purchase of commodities or contractual services utilizing competitive bids from other governmental entities including but not limited to federal, state, and local government entities.

(d) *Contracts which require an annual appropriation; contingency statement.* The city shall not enter into any contract for the purchase of tangible personal property for a period in excess of one fiscal year, unless the following statement is included in the contract: "The city's performance and obligation to pay under this contract is contingent upon an annual appropriation by the city council."

(e) *Title to property.* The city manager is delegated the administrative authority to declare surplus city personal property and sell the same by a competitive award process or by public auction. Surplus property can be disposed of, as determined at the discretion of the city manager, by trading in on new commodities, donating it to another governmental agency, or by junking if the property is determined to be unfit for sale and of no usable value. Exception is made for the sale of small or non-conforming real estate with a valuation below the city manager's purchasing authority (as established by either the City of Jacksonville Property Appraiser or certified appraisal), which may be sold at the city manager's discretion. The sale of conforming real estate, or real estate with a valuation above the city manager's purchasing authority (as defined above) shall require city council authorization and determination of the sales process. For the sale of small or non-conforming real estate which requires only the city manager's authorization to be sold, the following procedures shall be used:

(1) The city department interested in selling real estate will initiate a memorandum to the city manager indicating the interest, providing a general description of the real estate, and providing the reasons for sale. The department shall indicate in the memorandum which department employee will be assigned as the department's representative for issues related to the sale. The department's representative, procurement officer, city attorney, and city manager or designee will comprise the committee that will coordinate the efforts to sell the real estate.

(2) The city manager will determine the appropriate method of determining the valuation of the subject real estate.

(3) The appropriate staff members will be requested to negotiate the business terms of the sales agreement.

(4) Once the business terms are agreed to, the city attorney will draft the sales agreement.

(5) The finalized sales agreement, fully executed by the city attorney's office, will be presented to the city manager for approval.

(6) If the city manager approves the sales agreement, the purchaser will order the survey and title, assuming that the purchaser is responsible for ordering the survey and/or title. The purchaser may order an environmental survey at their discretion. The city attorney's office will distribute a contract schedule (developed by the purchaser) that will be distributed to the city manager or designee, procurement officer, and department's representative. Any issues that arise from the purchasers' performance of due diligence will be distributed to the full committee. The city attorney will be responsible for completing the closing with the assistance of other staff members and expert consultants assistance, if necessary.

(f) *Purchasing manual.* The city shall maintain a purchasing manual establishing purchasing policies, procedures and rules for all city departments. The purchasing manual must be adopted by the city council.

(Ord. No. 97-7708, § 1, 5-5-97; Ord. No. 2004-7869, § 1, 2-2-04; Ord. No. 2006-7910, § 1, 2-20-06; Ord. No. 2008-7958, § 1, 10-20-08; Ord. No. 2020-8160, § 2, 2-1-21)