POLICY NUMBER: 117

POLICY NAME: PURCHASING

It is the policy of the Board of Directors of the Collin Central Appraisal District (CCAD) to operate under a centralized purchasing concept. The intent of this policy is to insure that CCAD purchasing is administered in accordance with applicable state statutes, including the Texas Property Tax Code Section 6.11, Texas Local Government Code Chapters 252 and 271, and this policy.

1. **GENERAL RESPONSIBILITY:**

   The Chief Appraiser shall direct purchasing activities and is responsible for the acquisition and distribution of equipment, supplies, materials and services. Purchases shall be made in accordance with these policies and applicable state law. The Chief Appraiser shall develop general operating procedures for purchasing. The Chief Appraiser may assign roles, such as Purchasing Agent(s) and Purchasing Coordinators and delegate tasks as necessary to carry out this policy and implement the District's general operating procedures for purchasing.

2. **GENERAL POLICIES:**

   a. Encourage and seek competition among multiple qualified vendors.

   b. Actively pursue and obtain the best goods and services at the "best" lowest cost to CCAD.

   c. Assure that the public resources entrusted to CCAD are used appropriately, prudently and lawfully.

d. Provide responsible vendors, including *historically underutilized businesses* a fair and equitable opportunity to compete for and obtain CCAD business.

e. Manage and maintain CCAD assets so as to extend their useful lives.

f. Sell or otherwise lawfully dispose of obsolete and/or surplus property in a manner that benefits CCAD, taxing units and the taxpayers of Collin County.

3. BRACKETED PURCHASING LIMITS:

Based on the anticipated dollar value of the good(s) and/or service(s) being purchased, subject to the exceptions enumerated below, the following competitive quote, solicitation, and bid policies apply:

a. **Purchases of $1,500 or less** can be made by the Deputy Chief Appraiser or Purchasing Agent, or the Purchasing Coordinators with the approval of the Deputy Chief Appraiser or Purchasing Agent, from vendors on CCAD's qualified product vendor list, qualified service vendor list, authorized vendors under cooperative purchasing agreements, or from other reputable sources. At the Purchasing Agent's discretion, telephone quotes may be solicited.

b. **Purchases from $1,501 to $5,000** can be made by the Deputy Chief Appraiser and/or Purchasing Agent with approval of Deputy Chief Appraiser. These purchases require at least three telephone quotes or written quotes from vendors on CCAD's qualified product vendor list, qualified service vendor list, authorized vendors under cooperative purchasing agreements, or from other reputable sources.

c. Purchases from $5,001 to $25,000 can be made by the Chief Appraiser or Deputy Chief Appraiser and/or Purchasing Agent with approval of Chief Appraiser. These purchases require at least three written quotes from vendors on CCAD's qualified product vendor list, qualified service vendor list, authorized vendors under cooperative purchasing agreements, or from other reputable sources.

d. **Purchases from $25,001 to $50,000** require approval of the Board of Directors during a public board meeting posted in the time and manner required by law, with a quorum present. The Chief Appraiser will obtain at least three written quotes from vendors on CCAD's qualified product vendor list, qualified service vendor list, authorized vendors under cooperative purchasing agreements, or from other reputable sources. The Chief Appraiser will present a report of the written quotes and recommend a vendor for the Board's consideration and vote.

e. **Purchases exceeding $50,000** require approval of the Board of Directors during a public board meeting posted in the time and manner required by law, with a quorum present. Goods and/or service purchases exceeding $50,000 are subject to competitive sealed bidding or competitive sealed proposals, with general exceptions as provided by §252.022, Texas Local Government Code.

f. **Purchases via State contracts and/or cooperative purchasing agreements:** For goods and/or services to be purchased under the State of Texas CO-OP Purchasing, Texas Department of Information Resources (DIR), Texas multiple award schedule (TXMAS) or other cooperative purchasing agreements, the Purchasing Agent will obtain at least three quotes or proposals from currently approved vendors for any purchase exceeding $5,000. Should three quotes or proposals not be able to be obtained, written documentation will be maintained stating the reason(s) three quotes or proposals were not obtainable.

g. **Professional Service purchases**, other than those specifically requiring the Board of Directors enter in the contract (i.e. purchase or lease of real estate; contracts with another appraisal district to perform the duties of the appraisal office; preparation of annual audit, designation of depository and any other contract requiring board execution), can be made by the Chief Appraiser, or by the Deputy Chief Appraiser with approval of Chief Appraiser. For defined professional services, request for qualifications may be solicited.

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4. **COMPETITIVE BIDDING:**

   a. **Purchases** made by CCAD with regards to competitive bidding or competitive proposals are governed by §6.11, Texas Property Tax Code and Chapters 252 and 271, Texas Local Government Code.

   b. **Exceptions:**

      1. Sole source purchases involving goods and/or services for which there is legitimately only one supplier or source;
      2. Emergency Purchases in case of a public calamity, when prompt purchase of goods and/or services is required to provide for, preserve, and protect public health and safety or to preserve and protect CCAD property;
      3. Renewals or extensions of equipment leases or equipment maintenance agreements which are the result of a competitive bid process;
      4. Defined professional services as stipulated under the Texas Professional Services Procurement Act, Chapter 2254, and Texas Government Code.

5. **COMPETITIVE BIDDING IN RELATION TO HISTORICALLY UNDERUTILIZED BUSINESS:**

   a. When making expenditures of more than $3,000 and up to $50,000, the District shall contact at least two historically underutilized businesses on a rotating basis, based on information provided by the General Services Commission pursuant to Chapter 2161, Government Code.

6. **CAPITAL PURCHASES**

   a. Budgetary Impact. Capital items requested which are not budgeted will require approval by the Board of Directors with approval to execute a line item transfer of funds from another line item in the current budget, or from designated fund reserve. If approved, the funds shall be transferred for the capital acquisition.

   b. The Chief Appraiser will establish a capital asset inventory system.

7. VENDOR SELECTION

a. For goods purchased, to be based on the “best” low quoted, fixed, or negotiated (pursuant to a cooperative purchasing agreement) cost from a responsible vendor for a product which fully meets or adequately meets the established requirements and needs defined by the District.

b. For services purchased, exclusive of *defined professional services,* to be based on the “best” low quoted or negotiated cost for the identified service(s) to performed by a responsible vendor.

c. For *defined professional services*, to be based on the qualifications and demonstrated competence of the service provider, with competitive fees, subject to negotiation at a fair and reasonable price.

8. RECEIPT OF EQUIPMENT, SUPPLIES, MATERIALS AND SERVICES

d. Receiving purchases. Upon delivery, the Chief Appraiser, Deputy Chief Appraiser, Purchasing Agent, Purchasing Coordinator or Administrative Clerk shall account for all purchases. All packing slips must be signed and dated upon receipt of purchase or delivery.

e. Authority to Pay Invoice. Payment shall be made only for items or services actually received. All purchases must have final approval by The Chief Appraiser, Deputy Chief Appraiser and Purchasing agent are authorized to give final approval for payment based on the same level of authority given to each in the *Bracketed Purchase Limits section* of this policy.

Property Tax Code Section: 6.11

Texas Local Government Code: Chapters 252 & 271

Date Adopted: December 10, 2009

Resolution #: 2009-18