



SHELBY COUNTY GOVERNMENT
PURCHASING
POLICIES & PROCEDURES

Procedure No. **CA-INDEX**

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		October 1, 1992
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Procedure No. CA-010

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Subject: CONTRACT - PROCEDURES AND RESPONSIBILITIES	Effective Date October 1, 1992
	Supercedes

I. PURPOSE:

To clarify the procedures and responsibilities pertaining to the preparation of contracts.

II. SCOPE:

This procedure applies to all administrative departments, elected offices, boards and agencies of the county.

III. PROCEDURES:

A. CONTRACTS

1. All contracts are awarded based on the bid process or request for proposals for professional services.
2. At the time of award of a bid for contracts of a general nature, the Department is responsible for the preparation of Resolution packets (if necessary) and contacting the vendor to have the vendor submit a contract for review by the Contract Administration Section.
3. IF the vendor does not have a contract for submission, please contact the Contract Administration Section for assistance.
4. Specialty contracts or professional services contracts, i.e., Contracts for Construction Projects, Architect/Engineer Services, Professional Services, etc., will be prepared by the Contract Administration Section.

B. RENEWALS

1. Each Department is responsible for notifying Contract Administration of any contracts that will be renewed for the next fiscal year.



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Subject: CONTRACTING FOR PROFESSIONAL SERVICES	Effective Date October 1, 1992
	Supersedes

I. PURPOSE:

To establish the procedures involved in contracting for professional services.

II. SCOPE:

This procedure applies to all administrative departments, elected offices, boards and agencies of the county.

III. PROCEDURE:

1. Department Head submits request to the Administrator of Purchasing stating need for professional services.
2. Department Head prepares specifications or scope of work for the services to be provided and submits with request for services.
3. Administrator of Purchasing sends out Request for Proposals to all providers who have requested placement on the Professional Services Providers listing.
4. Proposals are generally due a minimum of 10 days from issue of Requests for Proposals. In certain situations, this time will be extended.
5. Upon receipt of proposals, the Department will be notified and a copy of each proposal will be forwarded to the department for review. (FOR ARCHITECT/ENGINEER SERVICES - PROJECTS OVER \$50,000.00 - EACH MEMBER OF THE CONSULTANTS REVIEW COMMITTEE WILL BE NOTIFIED AND A TIME SET FOR REVIEW OF PROPOSALS.)
6. Recommendations from the Consultants Review Committee shall be forwarded to the Mayor for final selection. (FOR ARCHITECT/ENGINEER SERVICES - PROJECTS OVER \$50,000.00 - REVIEW COMMITTEE SHALL SELECT A MINIMUM OF THREE (3) PROVIDERS AND SUCH RECOMMENDATION BY THE REVIEW COMMITTEE WILL BE SUBMITTED TO THE MAYOR FOR FINAL SELECTION.)

Selection shall be on a rotation basis with an effort to match background, experience and size of firm to size and type of project.



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Procedure No. CA-030

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Subject:

**CONTRACTS - CRITERIA FOR DETERMINING
PROPER ROUTING PROCEDURE**

Effective Date

October 1, 1992

Supercedes

I. PURPOSE:

To identify the proper routing procedures for contracts.

II. SCOPE:

This procedure applies to contracts for all administrative departments, elected offices, boards and agencies of the county.

III. REQUIREMENTS:

A. Contracts Requiring Approval By The Shelby County Board Of Commissioners.

Contracts meeting the following criteria require Board approval.

1. Sale of Property.
2. Any contract, etc. requiring expenditure of C.I.P. funds.
3. Franchise Agreement.
4. Contracts for the consolidation of duplicated or overlapping services with other Governmental entities (Example: Codes Enforcement).
5. Leasing of County property for over 30 years.
6. Lease Agreements where the expenditures over the entire term are over \$50,000.00 (subject to governmental funding).
7. Grant Contracts when granting authority requires approval of the County Legislative Body.
8. Contracts over \$50,000.00.
9. Contracts that require expenditure of funds in more than one fiscal year.



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Procedure No. CA-040

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Subject: CONTRACTS - ROUTING PROCEDURES FOR CONTRACTS REQUIRING BOARD OF COMMISSION APPROVAL	Effective Date October 1, 1992
	Supercedes

I. PURPOSE:

To provide routing procedures for contracts requiring Board of Commission approval.

II. SCOPE:

This procedure applies to contracts for all administrative departments, elected offices, boards and agencies of the county.

III. GENERAL:

The following is an outline of established resolution routing procedures.

If any of the information, documentation or signatures required in this procedure are not complete, the item will be returned to the originating department for correction.

IV. PROCEDURES:

1. A Resolution Packet must consist of an Agenda Route Sheet signed by the Department Head, a Summary Sheet, Original Resolution and all E.O.C. documents, if applicable, AND contracts.
2. Five (5) original contracts signed by the Contractor must be attached to the Resolution. (PLEASE NOTE: ALL CONTRACTS MUST STATE THE FEDERAL TAX IDENTIFICATION NUMBER OF THE CONTRACTOR. THIS NUMBER CAN BE PLACED UNDER THE SIGNATURE OF THE CONTRACTOR.) When applicable, an ORIGINAL and four (4) copies of Bonds, Insurance Certificate and Power of Attorney must be attached to the Contracts and Resolution packet.
3. The completed packet must be signed by the Department Head and by the Division Director, if possible, and forwarded to the Purchasing Department's Contract Administration Section.
4. The Contract Administration Section will process the Resolution Packet to the Finance Department's Budget Section for verification of funds and approval. Upon approval, it will be returned to the Contract Administration Section.