



CITY OF NORTH PORT PROCUREMENT FORM COMPETITIVE EXEMPTIONS



Please indicate: ☒ Visa Purchase ☐ Purchase Order

☒ Single Purchase (For current FY) ☐ Blanket Purchase (Ongoing purchases for current FY) ☐ Change Order ☐ Amendment

DEPARTMENT/DIVISION Finance/Purchasing

NAME OF REQUESTOR Alla V. Skipper

Sections 2-403 of the City of North Port Procurement Code states that certain procurements shall not be subject to competitive requirements in the judgment of the Procurement Official.

A. Please describe all products and/or services to be procured under this exemption:

Purchasing Card Program with Bank of America
Contract Manager: Jeri Winkleblack, VP 315 South Calhoun Street, 2nd Floor, Tallahassee, FL 32301 (Tel: 850.561.5921)

B. Vendor Information

Vendor Name: Bank of America, N.A.

Vendor Number:

Address: 3 Commercial Place, Fl 11 Norfolk, Va 23510

Contact: Jeri Winkleblack Phone: 850-404-6873 Email: jeri.Winkleblack@balm.com

C. Briefly explain why it is in the best interest of the City to exempt this procurement from competition:

(If additional space is needed, please attached separate memo)

The current contract is not eligible for renewal and in order to continue continuity of service, State of Florida Department of Management Services has agreed that local government entities may utilize the purchasing card program of the State of Florida. The rate of return is comparable of other entities and the State anticipates an increase will be approved which will equate to equal or more of the existing contract.

We will continue to monitor other programs which become available and pursue the avenues which will result in the best interest of the City.



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D. Please select one of the following:

- ☐ **Piggyback** (Departments may utilize another municipality, county, or other governmental agency contract). The requesting department must provide the following documentation: copy of the solicitation and addendum, tabsheet/price-sheet, vendor submittal, entity approval (either stated in the solicitation or letter from vendor) agenda approval and contract as back-up documentation. Purchasing may request additional information if needed.

Name of Entity:

Contract Number:

Start Date:

End Date:

Is a fee required to utilize this contract? ☐ Yes ☐ No If yes, how much?

☐ Vendor-Paid ☐ City-Paid

- ☒ **State of Florida Contract:** The requesting department must provide the following documentation: copy of the tab sheet/price sheet, agenda approval and contract ***Further price negotiations may be conducted with state-awarded vendor per F.S. 287.056(2) ***

Number: 841221500-15-01

Name/Category: Purchasing Card Program

Start Date: 01/05/2016

End Date: 01/04/2021

- ☐ **Florida Sheriff's Association Bid:** The requesting department must provide the following documentation: copy of the tab sheet/price sheet, agenda approval and contract

Number:

Name/Category:

Start Date:

End Date:

- ☐ **Joint Cooperative:** The requesting department must provide the following documentation: copy of the solicitation and addendum, tab sheet/price sheet, vendor submittal, agenda approval and contract

Lead Entity:

Contract Number:

Start Date:

End Date:

- ☐ **Code Exemption* (Specify):**

*For list of exemptions, see page 3



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Sec. 2-403. - Exemptions.

- (a) (2) Procurement contracts between the city and nonprofit organizations, other governments or other public entities.
- (3) Procurement of:
- a. Dues and memberships in trade and professional organizations.
 - b. Subscriptions for periodicals, books, maps or training videos.
 - c. Real property, real estate brokering, or appraising.
 - d. Abstract of titles for real property; title insurance.
 - e. Works of art for public display or artistic services.
 - f. Advertising.
 - g. Medical, dental and other medically related services performed by a health care professional.
 - h. Room or board for social service clients.
 - i. Room and board for employees on city business.
 - j. Funeral related services.
 - k. Water, sewer, electrical, cable television or other utility services.
 - l. Personnel, including but not limited to part-time or temporary services.
 - m. Academic program reviews or lectures by individuals.
 - n. Auditing services and financial services.
 - o. Legal services.
 - p. Social services.
 - q. Lobbying services.
 - r. Goods, materials and equipment whose cost has been incorporated as part of a competitively bid project.

☐ **Other Exemption (not specified by code):**

(If additional space is needed, please attach separate memo)

Vendor Tracking:

☐ Check if Vendor Documents Current

YTD Dept Exp. (Inclusive): \$ _____

To be completed by Purchasing:

YTD City Wide Exp. (Inclusive): \$ _____



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PURCHASE DETAILS

Please provide the amount of the purchase for this product or service: \$ N/A

Please provide the estimated fiscal year expenditure for this product or service: \$ N/A

| | | |
|-----------|-----------|-------------|
| Account # | Project # | Subtotal \$ |
| Account # | Project # | Subtotal \$ |
| Account # | Project # | Subtotal \$ |
| Account # | Project # | Subtotal \$ |

| Description | Unit | Qty | Unit Price | Total |
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| Shipping (FOB Destination) | | | | \$ |
| | | | Total | \$ |

Requesting Department Director: Kennedy Jura Date: 7/2/19

Budget Administrator: J. Heenan ^{N/A BUDGET} _{IMPACT} Date: 7/2/19

Purchasing: Ally Skipper Date: 7/1/19

Finance Director (If applicable): Kennedy Jura Date: 7/2/19

Assistant City Manager (If applicable): _____ Date: _____

City Manager (If applicable): _____ Date: _____

Commission Meeting Date (if applicable): _____