

April 12, 2022

MISSOULA COUNTY PURCHASING POLICY

1. General Principles

- Purchasing decisions should reflect the values of Missoula County.
- Equity and sustainability are as important as cost in making purchasing decisions.
- The public is best served by a competitive, open, and fair procurement process.
- Purchasing/procurement should be approached with humility and trust in the process.
- All steps in the process must be documented and available for public view.

2. Purpose

This policy seeks to establish fair, open, and competitive procedures for selecting vendors of goods and services at various spending thresholds while also emphasizing the County's role in increasing equity and environmental stewardship. This policy strives to comply with [MCA Title 7, Chapter 5, Part 23 "County Contracts"](#) and the applicable parts of [MCA Title 18, "Public Contracts"](#) and [Rule 2.5 of the Administrative Rules of the state of Montana, "State Procurement."](#)

3. References

- [Energy Efficient Building Policy No. 2021-1](#)
- [Waste Reduction & Recycling Policy No. 2021-04](#)
- [Contracts Policy No 2022-3](#)
- [Montana Registered Apprentice Program Resolution No. 2020-076](#)
- [Disadvantaged Business Enterprise Resolution No. 2020-061](#)
- [Buy Local Resolution No. 2021-001](#)

4. Sustainable Purchasing Guidelines


These guidelines reflect Missoula County's commitment to sustainability by minimizing the impacts of county purchases on human health and the environment. They are intended to complement the county's goal of carbon neutrality in government operations by 2035 (Resolution 2019-019), the Energy Efficient Building Policy (2021-1), and the Waste Reduction and Recycling Policy (2012-04).

Although a priority, these guidelines shall not jeopardize the county's:

- Financial solvency;
- Product performance or service delivery;
- Public and employee health and safety;
- Compliance with local, state or federal laws and regulations; or
- Ability to respond to emergencies.

General Guidelines

- Purchase the minimum amount needed of any product to minimize waste.
- Purchase reusable products rather than single use or disposable products whenever possible.
- Whenever possible, purchase products bearing reputable third-party eco-certifications such as those shown in the table below.

	<p>Energy Star: U.S. Environmental Protection Agency rating system for energy efficient products.</p> <p>https://www.energystar.gov</p>
	<p>Forest Stewardship Council: Certifies wood- and paper-based products to promote responsible forest management.</p> <p>https://us.fsc.org/en-us/market/find-products</p>
	<p>Green Seal: Certifies a variety of products based on health, sustainability, and product performance.</p> <p>https://greenseal.org/certified-products-services</p>
	<p>EcoLogo: Underwriters Laboratories (UL) program that certifies a variety of products based on reduced lifecycle environmental impact.</p> <p>https://www.ul.com/resources/ecologo-certification-program</p>
	<p>Safer Choice: U.S. Environmental Protection Agency rating program for cleaning products that are safer for human health and the environment.</p> <p>https://www.epa.gov/saferchoice</p>
	<p>WaterSense: U.S. Environmental Protection Agency rating program for water-efficient products (faucets, toilets, irrigation products)</p> <p>https://www.epa.gov/watersense</p>
	<p>Electronic Products Environmental Assessment Tool (EPEAT): Certification system for electronic equipment managed by the Global Electronics Council.</p> <p>https://www.epeat.net/</p>

Product Category Guidelines

The guidelines below apply to specific product categories. For purchases that do not fall into any of these categories, refer to the general guidelines above.

- **Appliances and Equipment:**
 - When comparing the price of products, consider their lifetime operational costs, including energy costs, in addition to purchase price.
 - Select products that maximize energy efficiency and energy cost savings over the lifetime of the product.
 - Select ENERGY STAR labeled products when available.
 - For appliances that use water, select Water Sense labeled products when available.
 - For electronic equipment, select EPEAT certified products when available.
- **Vehicles:**
 - When comparing the price of vehicles, consider lifetime fuel costs in addition to purchase price.
 - Choose the smallest vehicle size appropriate for the planned purpose and operation of the vehicle.
 - When purchasing a gasoline, diesel, or hybrid vehicle, prioritize vehicles with the highest fuel economy available for the respective vehicle class. Fuel economy information by vehicle model is available at www.fueleconomy.gov.
- **Paper/Wood Products:**
 - Maximize post-consumer recycled content.
 - Choose products certified by the Forest Stewardship Council.
- **Cleaning Products:**
 - Choose products certified by Green Seal, EcoLogo, or Safer Choice to protect the health of county employees and the public.
- **Food and Beverage:**
 - Consider options that use local and organic ingredients when available.
 - Where practicable, avoid the purchase of:
 - Bottled water
 - Disposable plates, cups, and utensils
- **Building Projects:** Refer to the county's Energy Efficient Building Policy No. 2021-1.

5. Scope and Applicability

This policy is applicable to all county departments and entities, for all acquisitions of goods and services. Departments may apply additional requirements if they are equal to or more restrictive than the procedures and standards established in this policy and consistent with the purposes of this policy.

6. Administration

- A. Department heads are responsible for the implementation of this policy within their departments.
- B. The County Auditor shall provide general oversight and assistance to county departments in the administration of this policy and should be considered a resource for questions and information regarding purchasing. In that role the County Auditor's responsibilities include but are not limited to: assisting departments with conducting solicitations, providing sample language and documents, performing bid openings, serving on evaluation committees if desired, and reviewing department documentation and procedures to verify compliance with this policy.
- C. Although the County Commissioners have final authority for administration, interpretation, and application of the terms of this policy, it is strongly recommended that questions of interpretation be resolved with the County Auditor prior to seeking an interpretation or ruling from the Commissioners.
- D. The public has the right to inspect and copy all purchasing documents except for sealed bids and legitimate trade secrets as defined in [MCA 30-14-4](#). No fee will be charged for document inspection or to vendors who provide their own copying equipment. The procurement officer may impose reasonable conditions on the manner and time of the copying to avoid disruption and to protect public access to the records. When copies are made by procurement officer or designate, a fee will be charged consisting of 50 cents for the first copy and 25 cents for each page thereafter.

7. General Guidelines

- A. Purchases shall not be artificially divided into separate projects or expenditures to circumvent the requirements of a more formal purchasing process.
- B. Long term service contracts for 12 months or more shall engage in the competitive process at least every 7 years according to the dollar thresholds established in this policy.
 - i. Service contracts of less than seven years may be extended without engaging in a new procurement process as long as the total contract, including extensions, does not exceed seven years.
- C. Maintenance and service contracts related to underlying assets (e.g. road maintenance equipment) shall engage in the competitive process at the expiration of the expected useful life of the asset.
- D. Per 18-4-313(2)(a) of the MCA, hardware, software, or other information technology resources shall have a maximum contract term of ten years.
- E. If the bids/proposals received indicate that the cost of the goods or services sought will

be greater than the amount budgeted, then a budget amendment must be approved by the Commissioners before the contract is submitted for approval.

- F. Awards shall be made to responsible vendors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration shall be given to such characteristics as integrity, commitment to the County's sustainable procurement guidelines, compliance with public policy, record of past performance, and financial and technical resources.
- G. Apart from individuals serving as jurors in District Court or Justice Court, all vendors must provide a Form W-9 to Finance before any payments for them will be processed.
- H. Unnecessary constraints shall not limit full and open competition. Examples of such constraints include:
 - i. Placing unreasonable requirements on vendors to qualify for business;
 - ii. Requiring unnecessary experience and excessive bonding;
 - iii. Writing unduly restrictive specifications;
 - iv. Specifying a "brand name" product instead of allowing "an equal" product to be offered.
- I. No employee shall participate in the award and/or administration of a contract if a conflict of interest exists, whether real or apparent. Such a conflict arises when the employee has a special relationship as a related party to a vendor or potential vendor.
- J. No employee may solicit or accept gifts in excess of \$50, or of a substantial economic benefit tantamount to a gift, from potential or actual vendors.

8. Interpretation

- A. If it is unclear which method of vendor selection to use, the decision shall always be made in favor of the more formal process.
- B. For items purchased multiple times during a fiscal year, the method of vendor selection shall be determined by the total value of the multiple purchases.
- C. For exchanges of property or services, this policy shall be interpreted to apply to the equivalent dollar value of the property or services to be exchanged.

9. Security Requirements and Gross Receipts Tax

- A. Bid security is required for all bids or proposals submitted in response to an IFB or RFP and must be provided in accordance with [MCA 18-1-201 through 206](#). Specifically:
 - i. Each bidder must provide a bid bond or other security in the amount of 10% of the bid price to protect and indemnify the county against the failure or refusal of the bidder to enter into a contract, if awarded.

- ii. The bond or other security is subject to forfeit if the bidder fails to enter a contract within 30 days of bid acceptance.
 - iii. The bid bond or other security must be in the form specified in MCA 18-1-203 and payable to the county.
 - iv. Bid security is returned to bidders whose bids are not accepted.
- B. Per [MCA 18-2-201](#), all construction contractors shall execute a bond to secure performance on the contract and payment of workers, subcontractors, and suppliers. Per [MCA 18-2-203](#), the amount of the performance bond must be equal to the full contract price. The bond must be made payable to the county. [MCA 18-2-201 \(4\)](#) allows the bond requirement to be waived for contracts less than \$50,000.
- C. Per [MCA 15-50-206](#), the county will withhold 1% of all payments due by a public contractor for all construction projects over \$5,000 as gross receipts tax and transmit that amount to the Montana Department of Revenue. Definitions of “public contractor” and “gross receipts tax” can be found at [MCA 15-50-101](#) and [15-50-205](#).

10. Procedures for Vendor Selection:

The procedures used for vendor selection depend on the type and amount of the expenditure and are addressed below in order of increasing formality and complexity.

Reputable county vendor.

For purchases of goods and services less than \$20,000, any purchasing technique may be used that best meets the needs of a department. Although a vendor may be chosen without seeking competition, it is recommended that departments use prudent purchasing practices and obtain competitive prices when practical. The supplier selected must be a “reputable county vendor”.

Written Quote.

For purchases of goods or services more than \$20,000 but less than \$40,000, a written quote process is used.

- I. The department contacts a minimum of three vendors to obtain a price on the desired item or service. Although price usually determines the vendor selected, other factors may be considered, such as: sustainable purchasing guidelines, quality and/or availability of the articles or equipment desired, responsiveness to the specifications desired for the work to be performed or the goods to be supplied, negative past experiences with the vendor, and/or status as a reputable county vendor. Vendor prices may be obtained through email, U.S. mail, fax, or website posting.
- II. The department maintains a record of the items sought, the vendors contacted, the prices quoted, and the vendor selected. Any quote obtained from a Related Party must be documented and disclosed. If three vendors are not available, an

explanation must be provided.

Limited solicitation.

A limited solicitation process is used for the procurement of goods and services greater than \$40,000 but less than \$80,000, subject to the exception for architectural, engineering, or land surveying services (see RFQ section). The dollar range for use of a limited solicitation applies to the initial contract term and any possible renewal periods.

- I. The department develops a written opportunity for a minimum of three vendors to offer a price on the desired item or service according to the specifications established for the purchase. In addition to the description of the goods or services desired, vendors should be provided with other relevant information, including but not limited to: the County's sustainable purchasing guidelines, compatibility with other county equipment; date the supplies, services, materials, equipment must be delivered or be available for county use; anticipated duration of the need for the services requested; any insurance or security/bonding requirements; and any selection criteria, including relative importance, to be used in addition to price. The vendor is selected using the criteria stated in the limited solicitation.
- II. The department documents the solicitation process by maintaining a file including: the written solicitation, a summary listing of the vendor responses, and a complete copy of the vendor response selected. Responses shall be available for public inspection or telephone inquiry. If three vendors are not available, an explanation must be provided. Any solicitation received from a Related Party must be documented and disclosed.

Invitation for Bids.

For procurement of goods, services, and equipment greater than \$80,000 where vendor selection is determined primarily on price with consideration the County's sustainable purchasing guidelines, an invitation for bid process is used. An IFB is also used for multiple purchases of the same item when it is reasonably expected that the annual amount of such purchases will be greater than \$80,000. IFB for construction contracts have additional requirements discussed in Section 9 above. An RFQ process may be used to prequalify vendors before an IFB is issued.

- I. The department develops an IFB package which generally conforms to the template available from the County Auditor. The package includes all pertinent information and specifications about the products or services sought, insurance and bonding requirements, etc.
- II. The department arranges for notice of the IFB to be published for a minimum

of two consecutive weeks in the newspaper under contract with the county to provide legal advertising. The final published notice must appear at least 3 days prior to the bid opening. The published notice shall contain: a brief statement about the procurement for which bids are sought, where complete specifications may be obtained if not provided in the published notice, the contact information for the county employee responsible for answering questions about the bid, specific bid requirements for contract or performance security, the initial contract term and any renewal periods, the address where bids are to be mailed, the due date and time for receipt of bids, and the location of the bid opening.

- III. Bids must be opened publicly at the time and place designated in the IFB. Each bidder and any member of the public has the right to be present, either in person or by agent, and has the right to examine the bids after they have been opened and reviewed by a representative of the department issuing the IFB. A record must be maintained of the amount of each bid, any other relevant information, and the name of each bidder. After the bid has been awarded, all bids and bid documents must be open to public inspection.
- IV. The bid is awarded to the lowest responsible bidder with consideration of the County's DBE resolution and the County's sustainable purchasing guidelines.
 - i. If there are no out of state bidders, [MCA 7-5-2309](#) allows an optional bidding preference to a County resident whose bid is no more than \$500 or 3% higher, whichever is less, than the bid of the lowest responsible bidder who is not a County resident.
 - ii. For construction projects over \$500,000, see Missoula County Resolution 2020-076.
 - iii. Sustainability should always be a prime consideration.
- V. Any bid from and awarded to a Related Party must be documented and disclosed.
- VI. The department issuing the IFB is responsible for maintaining complete documentation on the process including the text of the IFB, all responses received, proof of publication of the public notice, and a copy of the award contract.

IFB – Public Works Contracts.

In addition to the requirements above bid specifications and contracts for construction and non-construction services greater than \$25,000 are subject to the following provisions:

- VII. Contractor shall agree to:
 - i. Give preference to the employment of bona fide Montana residents in

- the performance of the work;
- ii. Include provisions for work that is performed at a project location to:
 1. Pay the travel allowance that is in effect and applicable to the district in which the work is being performed; and
 2. Pay the standard prevailing rate of wages, including fringe benefits, that is in effect and applicable to the district in which the work is being performed;
- iii. Post a copy of the applicable prevailing wage rates in a prominent and accessible site at the project location; and,
- iv. Maintain payroll records capable of certification for at least three years after completion of work under the Agreement.

If the term of the contract calls for more than 30 months to fully perform, contractor further agrees to increase the standard prevailing rate of wages by 3% every 12 months after the contract award date and apply the adjustment every 12 months for the duration of the contract.

VIII. **Bidding preferences.** Per [MCA 7-5-2309\(2\)](#), if one or more out of state bidders respond to a IFB for construction, repair, or maintenance of a building, road, or bridge, a resident bidder must be allowed a preference if the state of the non-resident enforces a preference for residents.

Bidding preference-Certified Apprentices. For construction projects over \$500,000, see Missoula County Resolution 2020-076.

B. **Request for proposals (RFP).**

An RFP is used for procurement of goods and services greater than \$80,000 when it is desirable to incorporate factors other than cost into the selection criteria. It is recommended that a selection committee be used to consider complex or high dollar RFPs.

- I. The department develops an RFP package which generally conforms to the sample documents available from the County Auditor. The package includes all pertinent information about the products or services sought, insurance and bonding requirements, as well as the selection criteria, relative importance, and scoring methodology that will be used to determine vendor selection.
- II. The department arranges for notice of the RFP to be published for a minimum of two consecutive weeks in the newspaper under contract with the county to provide legal advertising. The final published notice must appear at least 3 days prior to the RFP due date. The published notice shall contain: a brief statement about the procurement for which proposals are sought, where complete proposal details may be obtained if not provided in the published notice, the contact information for the county employee

responsible for answering questions about the proposal, any specific requirements for contract or performance security, the initial contract term and any renewal periods, the address where proposals are to be mailed, and the due date and time for receipt of proposals.

- III. RFPs for public works contracts greater than \$25,000 are subject to the prevailing wage requirements of [MCA Title 18, Chapter 2, Part 4](#).
- IV. After the proposals have been opened and reviewed by the procurement officer, proposal documents may be inspected by the public, subject to the limitations of the Uniform Trade Secrets Act, [MCA Title 30, Chapter 14, Part 4](#). An attorney for an offeror claiming trade secret status for parts of an RFP response must complete an Affidavit of Trade Secret Confidentiality and clearly mark and separate any bona fide trade secret material. This information is removed before public inspection.
- V. The award is made to the responsible and responsive offeror whose proposal obtains the highest score according to the stated evaluation criteria. No other criteria may be used. For construction projects over \$500,000, see Missoula County Resolution 2020-076.

Some criteria a department may use to choose a vendor include:

- 1. County sustainable purchasing guidelines
- 2. The qualifications of the professional personnel to be assigned to the project
- 3. Capability to meet time and budget requirements
- 4. Physical location of firm
- 5. Present and projected workloads
- 6. Related experience
- 7. Cost proposal

Any bid from and awarded to a Related Party must be documented and disclosed.

- VI. The department issuing the RFP is responsible for maintaining complete documentation including the text of the RFP, all responses received, proof of publication of the public notice, copies of the scoring sheets used to evaluate the merits of the proposals, and a copy of the award contract.

C. Request for Qualifications (RFQ).

A request for qualifications process is used to acquire professional services greater than \$80,000. A lower threshold of \$50,000 applies to architectural, engineering, or land surveying services, and procurement of these services must be consistent with [MCA Title 18, Chapter 8, Part 2 and the Missoula County Energy Efficient Building Policy \(2021-1\)](#). A provider of professional services is selected based on demonstrated competence and qualifications for the type of services desired at a fair and reasonable price.

- I. The department develops an RFQ which generally conforms to the sample documents available from the County Auditor. The package includes all pertinent information about the professional services sought, insurance and bonding requirements, as well as the selection criteria to be used. Selection criteria must adhere to the County's sustainable procurement guidelines and best practices when possible.
 - II. The department arranges for notice of the RFQ to be published for a minimum of two consecutive weeks in the newspaper under contract with the county to provide legal advertising. The final published notice must appear at least 3 days prior to the RFQ due date. The published notice shall contain: a brief statement about the services sought, where complete details about such services may be obtained if not provided in the published notice, the contact information for the county employee responsible for answering questions about the services, the initial contract term and any renewal periods, and the due date and time for receipt of materials.
 - III. The department evaluates statements of qualifications submitted by firms based on the following criteria:
 - i. County sustainable purchasing guidelines
 - ii. The qualifications of the professional personnel to be assigned to the project
 - iii. Capability to meet time and budget requirements
 - iv. Physical location of firm
 - v. Present and projected workloads
 - vi. Related experience
 - IV. After the preliminary evaluation of the firms' qualifications, the department conducts discussions with finalists and selects the firm best suited to provide services desired. A contract is then negotiated at a price that the department determines to be fair and reasonable given the estimated value of the services and the scope, complexity, and nature of such services.
- D. The department issuing the RFQ is responsible for maintaining complete documentation including the text of the RFQ, all responses received, proof of publication of the public notice, copies of the scoring sheets used to evaluate the firms' qualifications, and a copy of the award contract.

E. **Request for Qualifications - prequalification of bidders.**

An RFQ may be used to prequalify contractors for construction projects of significant complexity and cost. The RFQ process as outlined above is used to select a minimum of three contractors for designation as “prequalified”; this group is then invited to respond to the project IFB. The bid is awarded to the lowest prequalified bidder.

11. Exceptions

The following exceptions preempt the provisions of this policy.

A. **Direct negotiation.** When no bids or proposals are received in response to an IFB or RFP or if none of ones received are from responsible and responsive bidders or offerors, the procurement officer may:

- i. Cancel and reissue the IFB or RFP. If the department elects to reissue the request for bids or proposals, the procurement officer shall attempt to increase the number of potential vendors by modifying the specifications, allowing more time for the preparation of responses, broadening the potential pool of vendors, etc.
- ii. Negotiate directly with a vendor. Subject to the approval of the County Auditor, the procurement officer may negotiate directly with a vendor or vendors if a determination is made that a subsequent IFB or RFP would also be unsuccessful.
- iii. The department must document the circumstances that lead to direct negotiation for the desired goods or services.

B. **Emergencies.** Under very limited circumstances, a department may need the flexibility to make an emergency purchase. Such purchases are typically made outside of the normal purchasing procedures due to the sudden and unexpected situation that requires immediate action. The following procedures must be considered when making a determination regarding an emergency purchase.

- i. The purchase shall be limited to the supplies or services necessary to address the emergency;
- ii. Competition to the extent practical shall be obtained;
- iii. The Board of County Commissioners and the County Auditor shall be notified as soon as possible about the need for emergency purchases and/or contracts;
- iv. The department making the emergency purchase shall maintain a file of each emergency purchase, including the vendor’s name, a list of supplies or services purchased and the amounts, and a brief description of the emergency conditions justifying the purchase.

C. Sole source purchases. Under some limited circumstances, a department may need to consider making a sole source purchase for a supply or service available from only one known vendor. Because this purchase occurs without benefit of competition, departments should exercise great reluctance to use this procurement method. **No sole source contract may be longer than a five-year term. After the contract term the need for a sole source contract should be revisited.**

i. Sole source procurement is permissible under the following circumstances:

- a. The compatibility of current services or equipment, accessories, or replacement parts is the paramount consideration;
- b. There is no alternative, equivalent product to the one required;
- c. There is only one acceptable or suitable source for the supply or service item;
- d. Grant terms specify the equipment to be purchased.

ii. For sole source purchases over \$20,000, the department shall complete a sole source justification form prior to purchase and submit it to the County Auditor for approval. The department shall maintain a record of all sole source purchases over \$20,000 and include:

- a. The vendor's name;
- b. The amount and date of the purchase;
- c. The item or service purchased;
- d. The approved sole source justification form. .

D. Other exceptions. This policy does not apply to:

i. **Professional licenses and training** to maintain professional licensure or membership in professional accreditation organizations, including professional training, where relevant to the performance of an employee's work duties.

ii. **Purchases from Missoula County Central Services.** Central Services shall comply with this policy for all purchases made on behalf of other departments including office supplies, copiers, paper, and motor pool vehicles.

iii. **Purchases made under state bid contracts pursuant to [MCA 7-5- 2308](#).** Under this exception, the state of Montana has engaged in the competitive procurement

process.

iv. **Purchases made through a membership in a purchasing alliance.** Under this exception, Missoula County has a membership in a purchasing alliance that serves public agencies. The purchasing alliance engages in a competitive process on behalf of its members. The County Auditor can provide further information about these organizations.

v. **Purchases at public auction pursuant to MCA 7-5-2303** when, in lieu of soliciting bids, the department purchases at public auction a vehicle, road machinery, or other machinery, apparatus, appliances, equipment, or materials or supplies for an amount less than \$150,000.

vi. **Regulated Utilities**, although any contract for a fixed price supply of energy must be signed by the Board of County Commissioners.

vii. **Services provided by a grant sub-recipient or a community based organization.** This policy does not apply to a non-County organization which is a sub-recipient with Missoula County on a grant or to a community based organization receiving funding from the Community Assistance Fund. However, county departments administering grants shall comply with other procurement regulations stated in the grant award documents.

viii. **Hardware, software, or other information technology resources.** Per 18-4-313, MCA, the maximum contract term for hardware, software, or other information technology resources is ten (10) years.

12. Variances.

The County Commissioners have the discretion to grant a variance from the provisions of this policy at the request of a department head. Prior to the vendor selection process or contract execution, a request for variance shall be made in writing, with a copy to the County Auditor; the department head shall present the case for the variance at an administrative meeting of the County Commissioners. To support the request for variance, the department head shall be prepared to demonstrate good cause for the variance, as well as:

- A. How compliance with legal requirements will be achieved;
- B. How clear contract obligations will be formulated without undue exposure to liability;
- C. How a fair and open process for the expenditure of public funds will be maintained.

13. Vendor Protest Procedure.

A bidder or offeror aggrieved in connection with the solicitation or award of a contract may protest as follows:

A. The protest must be in writing and state in detail all of the protestor's objections and allegations of violations of the Missoula County Purchasing Policy and/or Contracts Policy and/or Montana state procurement law. The complete protest must be submitted to the County Auditor no later than 14 days after the vendor has been given notice their submission was not selected. The County Auditor shall issue a written decision on the protest within 30 days after receipt of the protest. The protest may be resolved by mutual agreement of all affected parties at any time during the process.

B. If the County Auditor rejects the protest, the reasons must be stated within the written decision; and the protestor must be informed of the right to appeal the decision to the Board of County Commissioners. Such an appeal must be made in writing delivered to both the County Auditor and the Board of County Commissioners within 7 days of the date of the County Auditor's written decision.

C. The Board of County Commissioners shall have a hearing within 30 days where the bidder or offeror has the opportunity to present arguments in the case.

D. After the hearing, the Board of County Commissioners may deny the protest, or may order one of the following remedies:

i. If the contract has not yet been awarded and it is determined that a solicitation or proposed award of a contract is in violation of this policy or applicable law, the solicitation or proposed award may be cancelled or revised to comply with the law and/or policy;

ii. If the contract has been awarded and the Board of County Commissioners determines that the solicitation or award is in violation of law or policy and the person awarded the contract has not acted fraudulently or in bad faith, the Commissioners may either:

a. Ratify and affirm the contract, provided it is determined that doing so is in the best interests of the County; or,

b. Terminate the contract and compensate the person awarded the contract for the actual expenses reasonably incurred under the contract prior to termination.

iii. If the contract has been awarded and the Board of County Commissioners determines that the solicitation or award of the contract is in violation of law and the person awarded the contract has acted in bad faith, the Commissioners may either:

a. Declare the contract void and seek appropriate remedies; or,

b. Ratify and affirm the contract if that action is in the best interests of the County, without prejudice to the County's rights to appropriate damages.

- iv. The County is not required to delay, halt, or modify the procurement process pending the result of a protest, contested case proceeding, or judicial review.

14. Real Property and Conservation Easements.

Acquisitions of real property and conservation easements are subject to the provisions of [MCA 7-8-2520](#). Real property in excess of \$20,000 and conservation easements greater than \$80,000 are subject to valuation prior to purchase either by a certified general real estate appraiser or by three disinterested citizens appointed by a district court judge. Payment may not exceed such appraised value. Negotiations for such acquisitions shall be done in consultation with the County Attorney's Office.

Definitions

When used in this policy, the following terms and expressions shall have the meanings set forth below.

Affidavit for Trade Secret Confidentiality: A notarized statement submitted by an offeror's attorney acknowledging that material included in a Request for Proposals (RFP) is open to public inspection except for information that meets the provisions of the Montana Uniform Trade Secrets Act, MCA 30-14- 4.

Bid: A competitive price offer made by an intended bidder, usually in response to an Invitation for Bid (IFB).

Bidder: Any seller submitting a competitive bid in response to an Invitation for Bid.

Bid security: A guarantee in the form identified in MCA 18-4-312 that the bidder/offeror, if selected, will enter into the contract as bid within 30 days; otherwise, the bidder or guarantor will forfeit the amount of the security.

Competition: The process by which two or more vendors vie to secure the business of a purchaser by submitting the most favorable bid or offer for the requested supplies or services.

Construction services: Work performed by an individual in building construction, heavy construction, highway construction, and remodeling work.

Contract: A legally enforceable written or verbal agreement between Missoula County and any other governmental, public, or private entity for the procurement of goods or services of any type.

Contractor: Any individual or business having a contract with the county.

Emergency purchase: A purchase made without following normal purchasing procedures due to a sudden and unexpected happening or unforeseen occurrence or condition that requires immediate action.

Goods: Supplies, equipment, materials, commodities, specially manufactured products, etc acquired to conduct the routine activities of county government.

Invitation for bids (IFB): A method for establishing a price on desired goods using a written description of the specifications or attributes of the items sought, published notice, and formal, sealed bids. The IFB, RFP, and RFQ are the most formal methods of vendor selection.

Invoice: An itemized statement furnished to a purchaser by a seller, usually specifying the price of goods or services and the terms of sale. This is the least formal form of contract.

Life Cycle. Consecutive and interlinked stages of a goods or series system, from “cradle to grave”, e.g. from resource generation and raw material acquisition through production, use, and final disposal.

Limited solicitation: A process for establishing a price on desired goods or qualifications for performing desired services that does not require sealed bids or proposals or legal advertising but does require documented competition. The solicitation is issued in writing and requires a written response. This is a medium level of formality for selecting a vendor.

MCA: The Montana Code Annotated.

Non Construction Services: Work performed by an individual, not including management, office, or clerical work, for: the maintenance of publicly owned buildings and facilities; grounds maintenance for publicly owned property; the operation of public drinking water supply, waste collection, and waste disposal systems; nursing, nurse’s aid services, and medical laboratory technician services; material and mail handling; food service and cooking; motor vehicle and construction equipment repair and servicing; and appliance and office machine repair and servicing. See MCA 18-2-401 for a complete listing of non-construction services.

Offeror: A vendor who submits a response to a Request for Proposals.

Performance security: A guarantee in the form identified in MCA 18-4-312 that the bidder, if selected, will perform the specified work and will pay all laborers, suppliers, and subcontractors.

Professional Services: Labor, time, or effort furnished by a person licensed, registered, or certified to provide such labor. The term includes, but is not limited to, architects, engineers, surveyors, attorneys, accountants, land use planners, and consultants.

Procurement: The acquisition, with or without cost, buying, purchasing, renting, leasing, or otherwise obtaining goods or services. The term includes all functions that pertain to acquiring the goods or services, including the description of requirements, the search for and selection of

sources, preparation and award of contract, and contract administration and monitoring. It does not include the acquiring of supplies or services by gift.

Procurement officer: The employee of the department issuing an IFB, RFP, or RFQ responsible for administration of the procurement process.

Public works contract: A contract for construction services or non-construction services in which the total cost of the contract is in excess of \$25,000.

Quote: A method of establishing a price on desired goods, usually issued and obtained verbally. The lowest price quoted is generally used to select the vendor from whom the purchase will be made. This is the least formal method of vendor selection requiring documentation of competition.

Related party: A vendor or potential vendor who has a special relationship (including personal, familial, or financial) with the county or an employee of the county. Disclosure of the existence of the special relationship is necessary to avoid the appearance of preferential access to county business.

Reputable county vendor: A vendor that provides goods or services in its ordinary course of business and is duly licensed and operating in compliance with applicable laws and regulations. Consideration of vendor integrity, past performance for the county, and financial and technical resources may also be used as a guide to selection.

Request for Proposals (RFP): A formal process requesting vendors submit proposals to provide a solution to a problem or a need that a department has identified. The county has the ability to evaluate an offeror's response in accordance with established or stated criteria. The IFB, RFP, and RFQ are the most formal methods of vendor selection.

Request for Qualifications (RFQ): A formal process of inviting statements of qualifications used to contract for professional services,, to prequalify contractors prior to issuing an IFB, or to prequalify a pool of vendors to provide services on a specific project or to utilize on an as-needed basis . The IFB, RFP, and RFQ are the most formal methods of vendor selection.

Responsible: The capability in all respects to perform fully the contract requirements and the integrity and reliability that will ensure good faith performance.

Responsive: A bid, offer, or statement of qualifications that conforms in all material respects to the requirements or specifications identified in an IFB, RFP, or RFQ.

Sealed bid: A bid submitted in a sealed envelope to prevent dissemination of its contents before the deadline for submission of all bids.

Services: Labor, time, or effort furnished by a vendor.

Solicitation: A generic term used in lieu of the various methods of seeking competition for the goods and services desired by the County.

Specifications: A detailed description of what the purchaser requires and what a bidder or offeror must offer to be considered for an award. A specification may be a description of the physical or functional characteristics, or the nature of a supply or service.

Sustainability: The concept of meeting today's needs without compromising the ability of future generations to meet their needs.

Sustainable Procurement: The process of purchasing products and services in ways that promote fiscal responsibility, social equity, and community and environmental stewardship.

Vendor: A person or company offering goods for purchase or services for hire.