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Notie Lansford
Program Leader, County Training Program
Oklahoma Cooperative Extension Service
Oklahoma State University
Purchasing Handbook
For Oklahoma Counties

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Introduction

How to Use This Handbook

This is a revision of the 2002 *Purchasing Handbook for Oklahoma Counties* on Compact Disk.

This handbook revision has been prepared for use by County Purchasing Agents to aid them in performing their duties and by other county officials and employees to help them better understand the purchasing laws and procedures. It is intended as a guide to the responsibilities, duties, procedures, and statutory mandates regarding county purchasing for the County Purchasing Agent and other county offices and departments. This handbook is not meant to be all inclusive and complete, but should include sufficient references and other sources to help supplement the information that is provided.

This handbook has been prepared solely as a guide and source of reference for use in day-to-day job activities. It is not intended to be, nor should it be, used as a supplement to, or a replacement for, the Oklahoma State Statutes, opinions of the State Attorney General, and/or policies and procedures issued by the appropriate state agencies (Office of the State Auditor and Inspector, State Department of Transportation, Oklahoma Tax Commission, and others).

Every effort has been made to incorporate the latest statutes, opinions and interpretations. In every instance where a statement in this handbook disagrees with an Attorney General opinion, an interpretation of the statutes by a responsible state agency or District Attorney, and/or a procedure or policy issued by an
appropriate state agency, those opinions, interpretations, procedures, and policies take precedence.

**Technology**

This handbook revision is an interactive document on a compact disk (CD). You can download the information onto your computer, copy parts of the document, and print the document. However, a printed copy will not have the interactive capabilities of the on-line copy.

The interactive capability allows you to link from one spot in a document to another spot in the same document. For example, you can click on a heading entry in the Table of Contents, and you will be linked directly to that heading in the handbooks. You can click on the statute references on the right-hand side of the pages, and you will be linked directly to a complete version of that statute on the CD. Any word or groups of words in the text that appear in blue or green on your screen will link to something related to them.

You can use the Adobe Acrobat “search” feature as an index to search for particular items that you wish to reference. You can also page through the handbook just as you would a printed copy. The handbook appears on the screen exactly as it will appear when printed.

**Changes and Additions**

Changes in the 2007 version of the *Purchasing Handbook for Oklahoma Counties* are indicated with bold brackets. When you see information enclosed in bold brackets [xxxx], that means that the information is either new or has been revised since the last version. When you see two brackets standing alone [ ], that means that information has been deleted since the last version.
Statute and Other References

Statute references, Attorney General opinions, and other legal references that apply to material in the text of this handbook are printed in a column at the far right-hand side of the page in green. Each reference is situated so that it appears opposite the text to which it applies.

If you click on one of these references while using the on-line version, you will be linked directly to that reference located on the CD. In other words, if you click on a statute reference, you will be linked to the complete text of that statute.

Oklahoma Statute (O.S.) references are from the Oklahoma Statutes. References with the date “2007” have been amended since 2001.

This handbook is not intended to be a legal source to replace the Oklahoma State Statutes. In many cases the text paraphrases the statutes or interprets them in simpler language. For exact and complete statutory information, refer to the actual statute.

Procedures

This handbook includes some procedural information regarding purchasing. Many times procedures will vary from one county to another. This handbook is not meant to mandate procedures, and any procedures used in the purchasing process should comply with statutory law and with directions from the Office of the State Auditor and Inspector.

Forms

Since the purchasing forms are available online, and because many counties now develop their own computerized forms, samples of forms are not included in this version of the handbook. Please refer to the appropriate website for copies of the forms mentioned in the handbook.
In this handbook, you will see forms highlighted in blue. If you have an internet connection on your computer, you can click on the form and you will be linked to the form on the internet. If you do not have an internet connection, the link will not work.

Questions and Comments

We have made every attempt to provide as complete and accurate a handbook as possible. If you have any questions, comments, or suggestions, please contact the County Training Program at Oklahoma State University, 405-744-6555, FAX 405-744-8210, email ctp@okstate.edu.
Chapter One
County Purchasing Responsibilities

County purchasing practices in Oklahoma are regulated by the County Purchasing Act as defined in the Oklahoma Statutes, Title 19, Chapter 33, “County Purchasing Procedures.” These statutes are revised each year by the Oklahoma Legislature to keep them current and beneficial.
A well-organized purchasing system ensures that good business practices are followed when goods are purchased, leased, lease/purchased, or obtained by any other method that puts the goods under the control of a county entity.

Adequate records must be maintained to document the fact that the purchase and receipt of goods, inventory during use, and final disposition are done according to established procedures that follow legal mandates.

IMPORTANT NOTE:
Any county office, department, or other entity that makes purchases with county monies must comply with the county purchasing laws. All county officers, department heads, and other administrative individuals are responsible for ensuring that the county purchasing laws are followed when purchasing goods and services with county funds.

NOTE:
Article 10, Section 26 of the Oklahoma Constitution does not allow counties to go into debt beyond the income and revenue provided for any year without the assent of 3/5 of the voters.

The following paragraphs describe the functions and responsibilities of the various people involved in the county purchasing process.
The Purchasing Agent

Appointment and Responsibilities

All county purchasing is centralized in a single office and is carried out by a single Purchasing Agent whose job is to act as the shopper for the county. The County Purchasing Agent researches vendors, finds the most efficient products, places the orders, and makes all purchases for which county funds are used.

The County Clerk of each county, or another employee in the office appointed by the County Clerk, usually serves as the county Purchasing Agent.

NOTE: In counties with a Budget Board, the Budget Board may appoint and supervise the Purchasing Agent and set the agent’s salary. If they fail to do so, the appointment and supervision revert to the County Clerk.

The appointing authority (either the County Clerk or the Budget Board) approves any assistants that the Purchasing Agent needs to carry out the duties and responsibilities of that position and sets the salaries of both the Purchasing Agent and the assistants.

NOTE: The County Clerk’s salary does not increase if that individual also acts as the Purchasing Agent.

The appointing authority approves the assignment of adequate office space, furnishings, equipment, and supplies necessary for the Purchasing Agent to carry out the duties of that office. The Board of County Commissioners authorizes the office space.
In the county purchasing process, the Purchasing Agent has the following responsibilities.

NOTE: All purchases must be made in accordance with the County Purchasing Act. Purchases made with cash vouchers [(SA&I Form No. 2691) should be made through the County Clerk’s office on a cash voucher claim (SA&I Form No. 270) or a Court Clerk Revolving Claim form (SA&I Form No. 2511)] even though a Requisition-Purchase Order-Claim form is not necessary.

- Make all purchases for which county funds are used for the various institutions, departments, officers, and employees of the county, except at a public auction or unless otherwise provided by law. 19 O.S. 2007, § 1501(A)(1)

The Purchasing Agent is the shopper for all county purchases and all county purchasing must be conducted through this agent. County funds have been interpreted to mean all funds that are deposited with the County Treasurer.

- Make purchases for political subdivisions of the state within the county if authorized by appropriate action of the governing board or body of that subdivision. 19 O.S. 2007, § 1501(A)

- Request written recommendations from all county officers for commonly used supplies, materials and equipment whose use does not exceed twelve months in duration and that may be included in bid lists. 19 O.S. 2007, § 1505(B)(1)

- Request contracts from the State Purchasing Division, Department of Central Services for either making purchases directly or for comparing prices. 19 O.S. 2007, § 1505(B)(1)
Prepare and solicit bids for all purchases and dispositions where bidding is required by the statutes, including publishing legal notices, as required.

Bids on advertised bid requests are solicited on SA&I Form No. 4040, Invitation to Bid. The noncollusion affidavit on the back side of this form must be completed before any bid can be accepted.

In those cases where the description is contained on lengthy specification sheets, enter “See attached specification sheets” under “Description.”

NOTE:
If the vendor has its own bid forms and chooses not to use the Invitation to Bid form, SA&I Form No. 425, Affidavit for Filing with Competitive Bid may be used for the noncollusion affidavit.

Forward the bids, unopened, to the County Clerk who presents them to the Board of County Commissioners to open at an open meeting.

Notify successful vendors of bid acceptance.

Solicit telephone quotes of prices in cases where vendors have not submitted bids.

The Purchasing Agent records these quotes on SA&I Form No. 4046, Vendor Telephone Quote Sheet.

At least three quotes are required, unless circumstances make it impossible. In such cases, documentation is required.
Prepare and submit requests for road machinery and equipment acquired by the following methods through State Central Purchasing, Department of Central Services:

- Purchase
- Lease
- Lease-purchase
- Full warranty lease

Complete the purchase order parts of SA&I Form No. 1116, Requisition-Purchase Order-Claim.

Forward the Requisition-Purchase Order-Claim to the County Clerk.

Training Requirements

Within one year of being appointed or assuming their duties, all County Purchasing Agents must attend a training seminar on county purchasing procedures provided through the County Training Program at Oklahoma State University. The Commission on County Government Personnel Education and Training oversees this program. The County Training Program is implemented by the Oklahoma Cooperative Extension Service (OCES) at Oklahoma State University.

The County Clerk

As noted above, the County Clerk usually either assumes the duties of the County Purchasing Agent or designates an employee to perform those duties, unless the Budget Board appoints a Purchasing Agent.
In the county purchasing process, the County Clerk has the following responsibilities as County Clerk, whether serving as the Purchasing Agent or not:

- Upon receiving the *Requisition-Purchase Order-Claim*, encumber funds in the amount stated on the purchase order to the account specified.

- Assign a sequential number to the *Requisition-Purchase Order-Claim* and update SA&I Form 1821, *Purchase Order Calendar*.

- Certify that sufficient funds are available by signing the certificate on the *Requisition-Purchase Order-Claim*. An estimated amount may be assigned if the exact amount cannot be determined.

- Compare the *Requisition-Purchase Order-Claim* and invoice with SA&I Form No. 4030, *Receiving Report*, and the delivery document when an invoice is received from a vendor, and make sure that all three agree on cost, quality, and quantity.

Documents must be available for public inspection in the County Clerk's office.

On every contract entered into by any county, school district, technology center school district, or other county entity for payment for an architect, contractor, engineer, or supplier of construction materials of $25,000 or more, the Affidavit for Contracts and Payments (SA&I Form No. 4001) is required.
NOTE:
A signed statement as required by the statutes must also be completed and attested. For any vendor listed above that may have multiple contracts during a year, one statement can be completed and attested at the beginning of the year and is valid for the entire year.

- Submit documents to the Board of County Commissioners for payment.  
  19 O.S. 2007, § 1505(E)(11)
- Prepare warrants for payment after the Board has approved payment.  
  19 O.S. § 178.3
- Maintain the master inventory record for the county.  
  19 O.S. § 155.2
- Maintain *Requisition-Purchase Order-Claim* files for five fiscal years, not counting the current year.  
  Oklahoma Constitution  
  Article 10 § 11

**The Board of County Commissioners**

In the county purchasing process, the Board of County Commissioners has the following general responsibilities:

- Approve all blanket purchase orders prior to actual purchase.  
  62 O.S. § 310.8(A)(1)
- Approve the payment of claims by signing the “Approval By Governing Body” portion of the *Requisition-Purchase Order-Claim* form.  
  19 O.S. § 326
NOTE 1: For any elected officials who will not immediately succeed themselves, the Board of County Commissioners cannot approve claims during the first six months of the fiscal year in which their terms will expire that exceed one-half of the total allocated operating budget for the entire fiscal year.

NOTE 2: When members of the Board of County Commissioners will not immediately succeed themselves, they cannot acquire or dispose of any equipment. They must also pay all outstanding obligations prior to the expiration of their current term. All lease purchase contracts must be made current.

NOTE 3: The Board of County Commissioners cannot incur any indebtedness against the county that exceeds the amount appropriated for any specific item in the estimate of needs.

NOTE 4: All claims that are held over for further information must be acted upon within 75 days from the date of the purchase order’s filing. Any Requisition-Purchase Order-Claim not acted upon within 75 days is considered disallowed.

Open the bids and select winning vendors by determining the lowest and best bid. SA&I Form No. 4045, Bid Record, is used to list the vendor responses to the invitation to bid as the bids are opened.
Enter an explanation into the minutes of the meeting if the lowest bid is not selected as the lowest and best bid. Refer to Chapter Eight, Analyzing to Determine Lowest and Best Bids, for a suggested selection procedure.

Enter an explanation into the minutes of the meeting if a bid other than that recommended by the officer is selected. Written recommendations from requisitioning officers must be considered in the decision and preference.

Prescribe a uniform identification and inventory system for supplies, material, and equipment not used in the construction and maintenance of roads and bridges.

Create and administer an inventory system for all equipment of a county having an original cost of [$500.00] or more that is not used in the construction and maintenance of roads and bridges.

Create and administer an inventory system for all supplies and materials purchased in lots of $500.00 or more and that are not used in the construction and maintenance of roads and bridges.

Apply for credit cards to be used by the County Sheriff's office and issue them to the County Sheriff.
County Officers or Department Heads

**NOTE:**
All county offices, departments, boards, and other county entities are required to follow the county purchasing procedures defined in the statutes for all purchases made with county funds.

In addition to the specific responsibilities listed above for certain officers, all county officers, department heads, and other administrative individuals have the following general responsibilities in the county purchasing process:

- Ensure that purchasing is performed lawfully, that collusion and conflict of interest do not occur, and that purchases are made only from qualified vendors.

**NOTE:**
Any elected officials who will not immediately succeed themselves cannot submit claims during the first six months of the fiscal year in which their terms will expire that exceed one-half of the total allocated operating budget for the entire fiscal year.

- Designate, in writing, one or two employees to act as requesting officers for their office or department on SA&I Form No. 429, Resolution Appointing Purchasing Officers.

  These employees are authorized to sign requisitions in the absence of the county officer or department or administrative head.

- Designate two employees to act as receiving officers for their department.
The State Auditor and Inspector (SA&I) discourages designating the same individual as both requesting officer and receiving officer. Separating these functions maintains the proper checks and balances and reduces the possibility of collusion between an employee and a vendor. If an office has fewer than four people however, that office may need to violate this practice.

The requesting officer and the receiving officer should communicate however, to ensure that the items received are the same as those requested.

Each county officer or department head must file the names of their requesting and receiving officers in writing with the County Clerk. The names must also be entered into the minutes of a Board of County Commissioners meeting.

**NOTE:**
SA&I guidelines state that this procedure must be done once each fiscal year.

- Prepare and forward a list of commonly used items for bidding.  
  [19 O.S. 2007, § 1505(B)(1)]
- Review bids for special items requisitioned by their office, and submit a written recommendation as to the lowest and the best to the Board of County Commissioners prior to final approval by the Board.  
  [19 O.S. 2007, § 1505(B)(4)]
- Prepare a written justification when a purchase exceeds the authorized amount on a blanket purchase order and attach it to the Requisition-Purchase Order-Claim.  
  [62 O.S. § 310.8(A)(2)]
IMPORTANT NOTE:
Over expenditures should only occur in unforeseen circumstances and are strongly discouraged.

egov
Certify the existence of any emergency that requires the expenditure of funds and write an explanation to attach to the purchase order.

19 O.S. 2007, § 1505(I)

NOTE:
Emergency purchases that do not exceed $5000.00 may be made without bidding or submitting a requisition. Refer to “Emergency Purchases When A County Officer Declares An Emergency” in Chapter Four, Purchasing By Situation.

19 O.S. 2007, § 1505(I)

County Boards and Commissions

In addition to the responsibilities listed above, county boards and commissions not under the direct control of the Board of County Commissioners must designate purchasing officers, complete SA&I Form No. 428, Resolution Appointing Purchasing Officers for Board or Commissions, enter the resolution into the minutes of their meeting, and file a copy of the resolution with the County Clerk.

62 O.S. § 310.1

The County Sheriff

In the county purchasing process, the County Sheriff also has the following responsibilities in addition to those listed above:

egov
Notify the Board of County Commissioners in writing of the need for credit cards to be used in the County Sheriff’s office.

19 O.S. §§ 1506, 1507(A)
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Purchasing Handbook for Oklahoma Counties
Chapter One

1-14 County Purchasing Responsibilities

- Establish necessary controls and procedures to ensure that credit card use complies with the county purchasing laws as required by the statutes.

Refer to “Credit Cards” in Chapter Three, Purchasing Methods, and “County Sheriff Purchases by Credit Cards” in Chapter Four, Purchasing by Situation.

The Requesting Officer

In the county purchasing process, the requesting officer has the following general responsibilities:

- Write specifications for supplies, materials, and equipment requisitioned by their office in sufficient detail so that the Purchasing Agent, vendor, and receiving officer know what is being ordered and that the items received are the same as those ordered.

Refer to Chapter Seven, Writing Specifications, for help in writing specifications.

- Complete the requisition part of the Requisition-Purchase Order-Claim form

The Receiving Officer

County officers and department heads must designate two employees to act as receiving officers for their department. The names of the designated officers must be filed with the County Clerk and entered in the minutes of the Board of County Commissioners.

19 O.S. § 1507(B)

19 O.S. 2007, § 1505(A)(1)

19 O.S. 2007, §1505(A)(1)

19 O.S. § 1503
The receiving officer plays a key role in the county’s purchasing process. The major function of the receiving officer is to visually inspect all goods received to ensure that the items that are received are the same as the ones requested and are of the desired quality.

This visual inspection, which includes counting and measuring, ensures that county funds are paying for the goods that are requested, meet the specifications, and are of the quality and quantity stated in the **Requisition-Purchase Order-Claim**.

When receiving officers sign the receiving report, they are certifying that an inspection has been made and that the goods are as requested on the **Requisition-Purchase Order-Claim**.

**NOTE:**
A receiving report should be prepared for any and all items that are purchased and can be counted or measured. However, receiving reports of utilities, lease-purchase payments, or professional services may not be required.

The receiving officer has the following general responsibilities regarding purchasing:

1. Receive all supplies, materials, and equipment purchased, lease-purchased, or rented by their department and identify these items according to the identification system prescribed by the SA&I or the Board of County Commissioners as appropriate.

2. Determine that a valid purchase order exists for the items being received.

(If no **Requisition-Purchase Order-Claim** exists, the officer refuses the items and returns them to the vendor.)
.obtain a copy of the delivery ticket, bill of lading, or other such delivery
document from the person making the delivery.

- Prepare a list of the items.

- Obtain the signature of the person making the delivery, if possible, and
the type of delivery, such as UPS, US Postal Service, or other types.

- Note the delivery date and time of the delivery.

- Prepare SA&I Form No. 4030, Receiving Report, in quadruplicate, which
indicates the quantity and quality of the goods received and lists the
items that are back ordered and their estimated date of delivery.

- File the original Receiving Report and a copy.

- Forward a copy of the Receiving Report and the original copy of the
Requisition-Purchase Order-Claim to the Purchasing Agent.

- Forward a copy of the Receiving Report with the delivery documents to
the County Clerk.

- Maintain a record of all supplies, materials and equipment received,
disbursed, stored, and consumed by the department.

Normally, one of the receiving officers is designated as the department
inventory officer and is specifically assigned this duty.
Chapter Two
State Agencies' Roles In County Purchasing

The following sections describe the roles of certain state agencies in the county purchasing process as defined in the Oklahoma Statutes.
The Role of the State Auditor and Inspector in County Purchasing

The State Auditor and Inspector (SA&I) is responsible for establishing the procedures necessary to ensure the proper implementation of the county purchasing system and for developing the forms required for record keeping and auditing purposes.

In the county purchasing process, the SA&I has the following general responsibilities:

- Provide procedures, forms, and guidance for operating the county purchasing system. 74 O.S. § 214
- Prescribe a uniform identification system for all supplies, material, and equipment that is used to construct and maintain roads and bridges. 19 O.S. 2006, § 1502(A)(1)
- Please refer to Chapter Ten, Inventories of County Property, for more information.
- Create and administer an inventory system for all equipment that originally costs $500.00 or more that is used to construct and maintain roads and bridges. 19 O.S. 2007, § 1502(A)(1)(b)
- Create and administer an inventory system for all supplies and materials (consumables and fixed assets) that are purchased in lots of $500.00 or more and that are used to construct and maintain roads and bridges. 19 O.S. 2007, § 1502(A)(1)(b)
Receive and review documentation for the full warranty lease of road machinery and equipment.  

Forward documentation of the lowest and best bid to the State Purchasing Division in the Department of Central Services.  

Ensure compliance by performing audits of county purchasing procedures.

The Role of the Oklahoma Department of Transportation in County Purchasing

In the county purchasing process, the Oklahoma Department of Transportation (ODOT) has the following general responsibilities:

Use the County Road Machinery and Equipment Revolving Fund to purchase new or used road and bridge equipment for lease or lease-purchase to counties.

NOTE: Such purchases can only be made at the request of the Board of County Commissioners.

Make lease or lease-purchase agreements with counties for road and bridge equipment purchased from the County Road Machinery and Equipment Revolving Fund.
A county is eligible to enter into a lease or lease-purchase contract with ODOT for road machinery and equipment on a priority basis determined by the county funding classification designation during any fiscal year. This classification is developed by ODOT and the Association of County Commissioners of Oklahoma (ACCO) and approved by the ODOT County Advisory Board.

Whenever a county enters into a full warranty lease contract for road machinery or equipment, the county must notify the Office of the SA&I and provide that office with its requirements and specifications along with the proper documentation to be advertised for bids.

Notify the State Purchasing Division in the Department of Central Services of the county requirements when no funds exist in the County Road Machinery and Equipment Revolving Fund to purchase requested road and bridge equipment.

Certify to the county that funds are unavailable in the County Road Machinery and Equipment Revolving Fund.

The Role of the State Purchasing Division, Department of Central Services, in County Purchasing

If no funds are available in the Road Machinery and Equipment Revolving Fund, the State Purchasing Division, Department of Central Services in County Purchasing has the following responsibilities. Refer to “Purchasing From Bid Lists or State Contracts (Not Blanket Purchase Orders)” in Chapter Four, Purchasing By Situation, for additional information.

Supply state contract information to counties upon request.
Solicit bids to lease or lease-purchase requested items upon request of a county and notification from ODOT that funds are not available in the county Road Machinery and Equipment Revolving Fund.

Reject or accept any and all bids received from such requests.

Any bid accepted must meet the requirements and specifications of the requesting county.

Solicit bids for full warranty lease contracts for road machinery and equipment requested by the county.

Submit requests and specifications to the Office of the SA&I for approval.

The Office of the SA&I then forwards the approved requests to the State Purchasing Division for action.

Solicit bids and purchases of any item for the county upon request.

The Role of the County Training Program, Oklahoma State University, in County Purchasing

The County Training Program at Oklahoma State University (coordinated by the Oklahoma Cooperative Extension Service [OCES]) has the following responsibilities regarding county purchasing in Oklahoma:

Prepare, revise, publish and distribute the Purchasing Handbook for Oklahoma Counties.
Plan and conduct training sessions for county purchasing agents at least once each year.

Provide technical assistance to county purchasing agents, county offices, and other county entities on purchasing procedures.

19 O.S. § 1500.(B)

19 O.S. 2007, § 130.5

County officers and deputies participate in a Purchasing class held by the County Training Program at OSU.
Counties in Oklahoma may use any of several methods for purchasing goods and services. This chapter explains the various methods to help Purchasing Agents and their customers determine the method(s) best suited to each particular situation and need.
The following possible purchasing methods are detailed in this chapter:

- Bid List
- Twelve Month Bid List
- Bid List for Less Than Twelve Months
- Telephone Quotes and Estimates
- Blanket Purchase Orders
- Purchases Without Bid
- Purchases With Bid
- Rental, Lease or Lease-Purchase
- Emergency Purchases
- Credit Cards
- Purchase of Heavy Equipment with Other Counties
- Blanket Bond

**Bid List**

The county maintains accurate pricing information to plan, budget, and requisition by placing items on a bid list and soliciting bids in advance of need. The bid list also permits Purchasing Agents to easily identify an item requisitioned by the bid list number in combination with specifications.

**The Purchasing Agent**

The Purchasing Agent has the following responsibilities when preparing a bid list:
Solicit, from county officials and department heads, recommendations of commonly used supplies, materials and equipment.

Refer to SA&I Form No. 4050, *List of Commonly Used Items to County or State Central Purchasing* for information on completing the form used for this purpose.

Prepare a list of commonly used items within the county from these recommendations, previous requisitions, purchase orders, and inventory records.

This list of items becomes the basis for a bid list.

**NOTE:**

The criterion for placing an item on the bid list should be that it is commonly used, not the item’s size or price, the quantity needed, or the number of offices using the item.

**Twelve-Month Bid List**

A twelve-month bid list (not to exceed twelve months) should be established. However, if no bids are received, a bid list for any period less than twelve months should be created. The procedure for each officer to follow when preparing a twelve-month bid list is outlined below.

Purchased items that are on the bid list must be made from the vendors listed. If another vendor offers the item at a lower price, the item should be opened for rebid, but only for that one purchase. Subsequent purchases must follow the original bid list unless another vendor offers the item again at a lower cost. The county must be as sincere in fulfilling its obligation of buying from the vendor as it expects the vendor to be in holding the price stable for the bid period.
The Purchasing Agent

The Purchasing Agent must use one of the following two methods to make purchases for a Twelve Month Bid List:

- Request the State Purchasing Division, Department of Central Services to purchase the items for the county.

- Solicit the bids for the county office, department, or county entity (most commonly used method).

**NOTE:**

Soliciting bids for every item on the list at one time is not necessary. Individual items or several items together may be bid or rebid at any time, even if the twelve-month period has not run its course. However, when items currently on the bid list are rebid before the bid period is over, the reason must be entered in the minutes of the Board of County Commissioners.

- Mail a notice to all persons or firms that have submitted a written request to be notified, plus any other person or firm that might be expected to bid.

- Publish a notice of the bid solicitation one time in a newspaper of general paid circulation in the county.

19 O.S. 2007, § 1505(B)(1)
Notices must be mailed and published at least ten days prior to the date bids are opened. Proof of the mailing must be made by affidavit of the person making the mailing, and must become a permanent part of the official records of the Purchasing Agent. Suppliers who do not respond for three successive solicitations can be dropped from the mailing list.

- Give sealed bids received and their contract prices from the State Purchasing Division, Department of Central Services (when available) to the County Clerk.

The County Clerk

After receiving the sealed bids from the Purchasing Agent, the County Clerk performs the following actions:

- Forward the sealed bids to the Board of County Commissioners.
- Forward the state contract prices to the Board of County Commissioners.

The Board of County Commissioners

At an open meeting, the Board of County Commissioners must complete the following actions:

- Open the sealed bids and compare them to state contract prices.
- Select the lowest and best bid. The selection, based on the availability of material and transportation cost to the job site, can be made within 30 days of the bid opening.
Keep a written record of the meeting as required by law.

Record the reason in the minutes if the lowest bid is not selected. Refer to Chapter Eight, **Analyzing to Determine Lowest and Best Bids**, for more information.

### The Purchasing Agent

After the Board of County Commissioners selects the bid, the Purchasing Agent has the following responsibilities regarding the twelve-month bid list:

- Notify the successful vendors.
  
  **19 O.S. 2007, § 1505(B)(5)**

- Keep a copy of the notification.

- Prepare, maintain, and distribute to county officials a listing of successful vendors and prices.

- Make purchases from successful vendors at the bid price or a lower one.

A vendor who refuses to provide goods or services as provided by contract may be removed from a bid list when authorized by the Board of County Commissioners.
Bid List for Less Than Twelve Months

If a twelve-month bid list (not to exceed twelve months) cannot be created because no bids are received after following the procedure listed above, the officers and Purchasing Agent should follow the procedures listed below to create a bid list for specified periods of less than twelve months. The Purchasing Agent may purchase from this reduced time bid list in the same manner as from the twelve month bid list.

The Purchasing Agent

For bid lists for periods of less than twelve months, the Purchasing Agent has the following responsibilities:

- Determine if vendors are willing to commit to bids for a shorter period.
- Solicit bids and award for the shorter period if vendors are willing.

The Purchasing Agent follows the same solicitation and awarding procedures as those listed for “Twelve Month Bid List” in this chapter.

Telephone Quotes and Estimates

Quotes shall be obtained by telephone when bids have been solicited and no bids are received, and vendors are unwilling to commit to bids for a reduced time. In this case, the Purchasing Agent should follow the procedures indicated.
The Purchasing Agent

The Purchasing Agent has the following responsibilities when obtaining telephone quotes and estimates:

- Obtain at least three quotes.
- Select the lowest and best.
- Forward the reason to the County Clerk in writing if the lowest quote is not selected.
- Record quotes on SA&I Form No. 4046, Vendor Telephone Quote Sheet.

If three quotes cannot be obtained, the Purchasing Agent must take the following steps:

- Prepare a written statement that explains the reasoning for making whatever selection has been made.  
  19 O.S. 2007, § 1505(B)(6)(c)
- Forward the statement and the clerk's copy of the Requisition-Purchase Order-Claim (1116) to the County Clerk.
- File both documents in the County Clerk's office.

The Purchasing Agent must follow these same procedures for “Telephone Quotes and Estimates” in this chapter, when telephone quotes are used to purchase fuel without bids.

The Purchasing Agent must follow these same procedures for “Telephone Quotes and Estimates” in this chapter, when telephone quotes are used to purchase, without bids, food for prisoners.

19 O.S. 2007, § 1501(A)(3)(g)
Departments of county government that need repairs to equipment, machinery, or vehicles must make estimates and request a *Requisition-Purchase Order-Claim* form from the Purchasing Agent for repairs not in excess of $2,500.00.

However, for repairs in excess of $2,500.00, a blanket purchase order must be used. Relevant procedures are outlined in the following section on “Blanket Purchase Orders.”

If a vendor who has been selected as the lowest and best bidder to furnish a particular item during a specified time is unable to perform, the Purchasing Agent may solicit telephone quotes for the needed item from the list of qualified bidders, and purchase it at the lowest and best available quote.

**Blanket Purchase Orders**

Using blanket purchase orders provides an easy, controlled method for making recurring purchases of goods and services while avoiding excess paperwork, saving time, and ensuring that goods and services are received when they are needed.

Blanket purchase orders must be used for the repair of county equipment, machinery, or vehicles when the estimated cost exceeds $2,500.00.

The maximum authorized amount of a blanket purchase order may be increased to cover unforeseen expenses. A written explanation must be attached to the blanket purchase order prior to payment.

Blanket purchase orders are useful in cases such as the following examples:

- Drug stores for medications and medical supplies
- Hospitals and doctors for treatment of prisoners
- Grocery suppliers for prisoner food items
- Auto parts stores for spare parts
- Tire stores for tires and batteries

Items on any of the county's bid lists may be included on a blanket purchase order.

The greatest disadvantage to using a blanket purchase order is that funds must be encumbered to pay for them prior to making the actual purchases.

The statutes do not limit the length of time a blanket purchase order can run except that it must not run past the end of the fiscal year. Most blanket purchase orders are closed at the end of 30 days because vendors like to be paid at least once a month. Any that are made for a specific project should be closed when the project is completed.

Refer to SA&I Form No. 1116, Requisition-Purchase Order-Claim for procedures to follow in preparing blanket purchase orders.

**The Requesting Officer**

When using blanket purchase orders, the Requesting Officer has the following responsibilities:

-interest Initiate a blanket purchase order by submitting to the Purchasing Agent a Requisition-Purchase Order-Claim that is marked as a blanket purchase order and which includes the following information:

- Recommended vendor
- List of items authorized to be purchased or a statement of the types of goods or services authorized to be purchased

62 O.S. § 310.8(B)
Before the Purchasing Agent places the order with the vendor, the following steps must be taken:

**The Board of County Commissioners**
- Must approve the *Requisition·Purchase Order·Claim*

**The County Clerk**
- Must encumber the funds
- Issue the *Requisition·Purchase Order·Claim* number.

Once the order is placed with the vendor, no further requisition is necessary. To purchase an item, the following procedures are followed:

**The Requesting Officer**
- Receive the *Requisition·Purchase Order·Claim* from the County Clerk.
- Contact the vendor for the item desired.
- Place the order.
- Acquire a copy of the invoice.
- Maintain copies of the invoices of purchased goods.
Ensure that the funds encumbered are not exceeded, or attach a written explanation to the Requisition-Purchase Order-Claim before payment that the maximum amount authorized has been increased to cover unforeseen expenses.

Sign the Requisition-Purchase Order-Claim.

The Receiving Officer

- Verify the purchases.
- Compare the invoice with the requisition for any discrepancies.
- Attach invoices, receipts, and receiving reports or a list of purchased goods to the Requisition-Purchase Order-Claim.
- Forward the entire document packet to the Purchasing Agent.

The Purchasing Agent

- Review and sign the Requisition-Purchase Order-Claim.
- Send the packet to the County Clerk for payment.

The County Clerk

- Pay the invoice if all of the documents are in order

62 O.S. § 310.8(A)(2)

62 O.S. § 310.8(B)
Purchases without Bid

The Purchasing Agent

When making purchases without bids, the Purchasing Agent must follow the procedure listed below:

- Make all purchases and rental or lease-purchase agreements without bidding only under the following conditions:
  - When the purchase does not exceed $10,000.00 on a single purchase order.
    Splitting purchases that would otherwise exceed this amount is prohibited.

  WARNING:
  Splitting purchases for the purpose of avoiding competitive bidding and paying an amount in excess of $10,000.00 is prohibited. Any persons convicted of violating this provision will be guilty of a misdemeanor and will forfeit their position or office.

- When the total payments of a rental or lease-purchase do not exceed the current bid limit.

NOTE:
SA&I interprets the bid limit mentioned above, to mean that the expenditure of more than the bid limit within a year (not necessarily a fiscal year) for the same item, service, system, etc. would be a violation of this provision and would constitute splitting purchase orders under most circumstances.
- When articles and items are covered by sole source contracts

**NOTE:** Refer to 74 O.S. § 89 for the affidavit that is used to affirm the necessity for sole source contracts and the possible penalty for falsely affirming on a contract.

- For service and maintenance contracts on equipment where contracts are entered into at the time of equipment purchase of the equipment
- For purchases made using a blanket purchase order
- When the cost of materials for road or bridge improvements does not exceed $3.00 per yard or ton
- For purchases of fuel, if the Purchasing Agent obtains telephone quotes
  
  See the section on “Telephone Quotes and Estimates” in this chapter for further discussion of telephone quotes.

- For purchases of tools, apparatus, machinery, or equipment from a state agency or a political subdivision of the state, provided the supplier is subject to the State Purchasing Act or a similar competitive bidding procedure

- For purchases of food for prisoners held in the county jail, if the Purchasing Agent obtains telephone quotes
  
  See the section on “Telephone Quotes and Estimates” in this chapter for further discussion of telephone quotes.

- When a county solicits bids for the purchase of processed native materials for road and bridge improvements
NOTE: The county may accept all bids received, and select the lowest and best bid from those accepted when any construction project is opened. The selection of the bid must be based upon availability and bid price plus transportation cost.

- When a vendor has been selected as the lowest and best bidder to furnish a particular item or items to the county during a specified time period and then is unable to perform
  In this case, the Purchasing Agent may solicit telephone quotes for the needed item or items from the list of qualified bidders and purchase the items at the lowest and best quoted price available.

- When an exact same item or items from the state bid list, as provided by the Department of Central Services, is available from a local vendor at or below the price listed on the state bid list
  In this case, the item may be obtained from the local vendor.

- For any item or items bid by the Department of Central Services that may be purchased by the county, provided the vendor is willing to supply the item or items to the county at the bid price

- When obtaining professional services
  Professional services means services that are predominantly mental or intellectual in character, including services requiring special (usually advanced) education and skill.

- When the Purchasing Agent requests the State Purchasing Division, Department of Central Services to make the purchase

- When purchases are made from a State Purchasing Division, Department of Central Services contract
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Chapter Three

Purchasing Methods

- When an item or items have been competitively bid by a county, or on behalf of a group of contiguous counties, with certain restrictions defined in the statutes
  
  19 O.S. 2007, § 1501 (A)(3)(o)

- When participating in a nationwide [ ] purchasing program sponsored by the national association representing counties
  

- When the Governor declares an emergency in a county and the district attorney exercises the authority to temporarily waive competitive bidding procedures for purchases that may expedite a response to the emergency situation
  
  19 O.S. 2007, § 1501 (A)(3)(q)

Purchases with Bid

All purchases that exceed [$10,000, ] and rentals, leases, and lease-purchases that exceed the current bid limit, other than those exempted in the list in the section on “Purchases Without Bid,” must be bid.


The Purchasing Agent

Bid list items must be bid following the procedures in the section on “Bid List” in this chapter. When purchasing items on a current bid list, the Purchasing Agent completes the following actions:

- Take bids on an item currently on a bid list at any time considered necessary.

  19 O.S. 2007, §1505(B)(1)

- Enter the reason in the minutes of the Board of County Commissioners when any bid is solicited for an item that is already on the bid list.
When purchasing items not on a bid list, other than those that are exempt, the following individuals must follow the procedures outlined below:

**The Requesting Officer**
- Prepare the requisition portion of SA&I Form No. 1116, *Requisition-Purchase Order-Claim.*

**The Purchasing Agent**
- Prepare the request for bid.
- Mail the request to vendors.
- Publish notification at least ten days prior to the bid opening.

The bidding process is the same as described in the section on “Twelve Month Bid List” in this chapter.

**The Requesting Officer**
- Review the bids.
- Submit a written recommendation to the Board of County Commissioners for their final approval.
The Board of County Commissioners

- Select the lowest and best bid, based upon the availability of material and transportation cost, within thirty days after opening.  
  19 O.S. 2007, § 1505(B)(4)
- State the reason in the meeting minutes and in a letter to the requesting officer if the recommendation of the requesting officer is rejected.

The Purchasing Agent

- Notify the successful bidder.  
  19 O.S. 2007, § 1505(B)(5)
- Prepare the purchase order.

Rental, Lease or Lease-Purchase

Rental, lease and lease-purchase arrangements are made through the Purchasing Agent. The Board of County Commissioners signs the actual contract agreement.  
19 O.S.2007, § 1501

Refer to Chapter Five, Purchasing By Situation: Rental, Lease, or Lease Purchase, for additional information.

In an emergency, specialized road machinery or equipment may be leased for periods not to exceed thirty days. However, if the cost of the lease will exceed the current bid limit, it must be bid.  
69 O.S. § 636.3(A)

Road machinery and equipment may be leased or lease-purchased through the Oklahoma Department of Transportation (ODOT) from funds in the County Road Machinery and Equipment Revolving Fund, provided funds are available in the fund.  
Lease or lease-purchase of road machinery and equipment may be made directly with the vendor following procedures described in detail below.

Any vehicle leased or lease-purchased by the county from a vendor is exempt from any fees required by the Oklahoma Vehicle License and Registration Act. 47 O.S. § 1139.1

If funds are not available in the County Road Machinery and Equipment Revolving Fund, The Oklahoma Department of Transportation (ODOT) will certify that fact to the State Purchasing Division, Department of Central Services and to the county. Road machinery and equipment may then be leased or lease-purchased through the State Purchasing Division. 69 O.S. § 636.3(E)

A full warranty lease contract for road machinery and equipment may be made through the State Purchasing Division by submitting documentation through the State Auditor and Inspector (SA&I) for review and approval. 69 O.S. § 636.3(G)

Lease or lease-purchase agreements for road machinery and equipment may be made by following the bidding procedures detailed in the section “Twelve-Month Bid List” in this chapter, provided adequate funds have been appropriated for this purpose during the fiscal year. 19 O.S. 2007, § 1501(A)(5) 19 O.S. § 1505(B)(1)

The term of the lease or lease purchase agreement may be for any period up to one year, provided it does not extend beyond the fiscal year end. The contract may be renewed provided funds are appropriated each year. 19 O.S. 2007, § 1501(A)(5)

Before the Purchasing Agent completes any such agreement, the SA&I must be notified of the terms and conditions by forwarding a copy of the contract to the SA&I after it has been signed by the vendor. SA&I Form No. 120B, Lease Purchase Agreement for Equipment, must be used for the contract.
Emergency Purchases

The Emergency Management Act of 2003 was written to ensure that preparations of this state will adequately deal with natural and man-made disasters and emergencies, to generally provide for the common defense and to protect the public peace, health, and safety, to preserve the lives and property of the people of this state, and to carry out the objectives of state and national survival and recovery in the event of a disaster or emergency.

Emergency Purchases When a County Officer Declares an Emergency

If county officers certify the existence of an emergency that requires the immediate expenditure of funds, they may waive regular purchasing procedures. Expenditures for emergency purchases cannot exceed $5,000.00.

NOTE:
The procedure for the encumbrance of an emergency purchase order should begin at the beginning of the next business day after the emergency is declared.

An Emergency Declared by the Governor

When the Governor declares an emergency in a county, the district attorney has the authority to temporarily waive competitive bidding procedures for purchases that may expedite a response to the emergency situation.
A Emergency Management or Disaster Emergency Declared by the President or the Governor

When a state of emergency is declared by the U.S. President or the Governor due to enemy attack or disaster, county entities may incur obligations necessary to combat the disaster, protect the health and safety of persons and property, and provide emergency assistance to victims without regard to purchasing processes and formalities prescribed by law.

An Emergency Declared by the Governing Body of a Public Agency under the Public Competitive Bidding Act

According to the Oklahoma Emergency Act of 2003, when the governing body of a public agency declares an emergency, by 2/3 majority vote, the Public Competitive Bidding Act does not apply to any contracts of $35,000.00 or less. For the Department of Transportation and the Oklahoma Turnpike Authority, the act does not extend to any contract exceeding $500,000.00 in amount.

Credit Cards

Any County Sheriff or Deputy Sheriff who uses a credit card may purchase materials, supplies, or services necessary for travel out of the county with a credit card(s) issued by the county for that purpose.

63 O.S. 2007, § 683.3(3)

61 O.S. 2007, § 130

19 O.S. § 1506(A)
Credit card purchases are limited to actual travel expenses out of the county in the performance of official duties. "Actual expenses for travel" mean expenses incurred for travel by the following means:

- Public or private railroads
- Airplanes
- Buses
- Rental cars
- Other public or private conveyances

"Actual expenses" also include the following items:

- Oil
- Fuel
- Meals
- Lodging
- Parking fees
- Telephone expenses

The County Sheriff's office may also use the card to purchase fuel within the county on weekends, nights or holidays when fuel can not be obtained from the vendor to whom a bid for fuel purchase has been awarded.

**The County Sheriff**

☞ May request that the Board of County Commissioners apply for credit cards for use in the County Sheriff's department
The Board of County Commissioners

- Issue the cards to the sheriff's office when they are received.

Please refer to “County Sheriff Purchases By Credit Cards” in Chapter Four, *Purchasing Situations* of this handbook for more detailed procedures and limitations.

Any County Sheriff or Deputy Sheriff Who Uses a Credit Card

Please refer to “County Sheriff Purchases By Credit Cards” in Chapter Four, *Purchasing Situations* of this handbook for detailed procedures and limitations.

Purchases with a Cash Voucher Claim

When the County Treasurer makes a purchase using monies from the resale property fund, SA&I Form No. 270, *Cash Voucher Claim*, is used instead of the *Requisition-Purchase Order-Claim*.
The County Treasurer

- Complete the Cash Voucher Claim.
- Register the claim in the warrant register.
- Give the claim to the vendor when making a purchase.
  The vendor signs the claim and returns it to the County Treasurer with the invoice for the item(s) purchased.
- Retain a copy of the Cash Voucher Claim; sends the signed original Cash Voucher Claim along with the invoice and the Receiving Report to the County Clerk.

The County Clerk

- Upon receipt of the signed Cash Voucher Claim, write the voucher on SA&I Form No. 2691, Voucher.
- Forward the Voucher to the County Treasurer.

The County Treasurer

- Retain and file a copy of the Voucher and gives the original Voucher to the vendor.
Purchases with Other Counties

Purchasing With Other Counties

A group of contiguous counties may purchase items together under certain conditions. Please refer to “Purchasing Items With Other Counties” in Chapter Six, Purchasing By Situation: Purchasing With Other Counties, of this handbook.

Purchasing Heavy Equipment with Other Counties

The Board of County Commissioners is empowered to buy heavy equipment jointly with other counties, and to loan or lease such equipment across county lines.

Details of the procedures for these purchases are prescribed by the SA&I and can be found under “Purchasing Heavy Equipment With Other Counties” in Chapter Six, of this handbook.

Blanket Bond

The Board of County Commissioners of each county must purchase a surety contract or contracts in the form known as a blanket bond from the lowest bidder. This blanket bond covers all county officers, appointive officers, employees, and reserve force deputy sheriffs.
No other bond is acceptable in lieu of this blanket bond as surety for any elected or appointed officer or employee of this state, unless a blanket bond is provided as a specified item in an all-risk insurance policy purchased by the county.  

19 O.S. § 167
Chapter Four

Purchasing By Situation

Chapter Four outlines specific instructions for making purchases under the varied situations encountered by county offices, departments, and other entities.

Sharon Selve, Noble County First Deputy County Clerk, reviews prices on a bid list.
Chapter Five, *Purchasing By Situation: Rental, Lease, or Lease-Purchase*, and Chapter Six, *Purchasing By Situation: Purchasing With Other Counties*, contain information about those two specific purchasing situations.

The instructions in these chapters have been written in coordination with and have been approved by the Office of the State Auditor and Inspector (SA&I), the Oklahoma Department of Transportation (ODOT), and the State Purchasing Division of the Department of Central Services.

When a purchasing situation falls under more than one major category, the specific instructions are found under the major category that best describes the situation.

**Purchasing From Bid Lists or State Contracts**

**Purchases from Local Vendors at State Prices**

An item may be purchased from a local vendor under the following conditions:

- If the same exact item is available from that vendor as is available from the Department of Central Services
- If the item is priced at or below the price listed on the state bid list
- If the state contract is documented on the purchase order

Any item or items bid by the Department of Central Services may be purchased by the county, provided the vendor is willing to supply the item or items to the county at the bid price.

**NOTE:**

For procedures for forming bid lists, refer to Chapter Three, *Purchasing Methods*, of this handbook.
Blanket Purchase Orders from Bid Lists

A purchase made with a blanket purchase order requires the following procedures:

The Requesting Officer

1. Complete the requisition portion of the SA&I Form No. 1116, Requisition-Purchase Order-Claim, when preparing a blanket purchase order from a bid list.  
2. Reference the vendor and bid list number [ ] or the state contract number in the “Suggested Vendors” box of the form.  
3. Check the “Blanket P.O.” checkbox.  
4. Specify the maximum amount of funds to be encumbered and the account number on the “Amount” line.  
5. Retain copy 5 of the form.  
6. Forward the remaining four copies of the form to the purchasing agent.

The Purchasing Agent

6. Indicate the date received in the “Date Requisition Received” box.  
7. Complete the purchase order portion of the Requisition-Purchase Order-Claim form.  
8. Forward the Requisition-Purchase Order-Claim to the County Clerk within two days.
The County Clerk

9. Encumber the funds, assign the purchase order number, and certify the purchase order on the *Requisition-Purchase Order-Claim* form.

10. Submit the *Requisition-Purchase Order-Claim* form to the Board of County Commissioners.

The Board of County Commissioners

11. Approve the purchase order by either signing the form or by resolution in a regular meeting.

The County Clerk

12. Retain copy 2 of the form.

13. Return the remaining three copies of the form to the purchasing agent.

The Purchasing Agent

14. Complete the purchase order portion of the *Requisition-Purchase Order-Claim* form.

15. Notify the vendor of the purchase order number and the maximum amount.
The Requesting Officer

16. May make purchases from the blanket purchase order without further requisitions at any time after the order is placed

17. Assure that the amount of funds encumbered is not exceeded as purchases are made

18. Certify on the Requisition-Purchase Order-Claim form that the encumbered amount is not exceeded in the “Blanket Purchase Order” box when the blanket purchase order is to be closed.

The Receiving Officer

19. Prepare SA&I Form No. 4030, Receiving Report, on all items purchased.

Consumables purchased in lots of $500.00 or more must be included in the consumable inventory.

20. Attach copies of receiving reports and invoices.

21. Forward all documents to the purchasing agent.

NOTE: The County Officer prepares written justification for the excess if the blanket purchase order exceeds the encumbered amount and forwards justification with the other documents to the purchasing agent.

WARNING: Exceeding the encumbered amount should happen only in extreme circumstances.
The Purchasing Agent

22. Complete the “Adjustment/Amount,” and “Adjustment/Total” columns on the Requisition-Purchase Order-Claim form.

23. Retain the original Requisition-Purchase Order-Claim form and a copy of each Receiving Report.

24. Forward the remaining copies to the County Clerk for payment.

Purchases from Bid Lists or State Contracts (Not Blanket Purchase Orders)

A purchase made from a bid list or state contract (rather than a blanket purchase order) requires the following procedures to be followed:

The Requesting Officer

1. Complete the requisition portion of the Requisition-Purchase Order-Claim form.

2. Reference either (1) the item number and bid list or (2) the state contract number from which the purchase is to be made.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent.

The Purchasing Agent

5. Indicate the date the Requisition-Purchase Order-Claim form is received.
6. Begin procedures to make the purchase from the bid list or state contract within two days.

7. Complete the purchase order portion of the *Requisition-Purchase Order-Claim* form.

8. Forward the *Requisition-Purchase Order-Claim* form to the County Clerk.

**The County Clerk**

9. Encumber the funds, assign the purchase order number, and certify the *Requisition-Purchase Order-Claim*.

10. Retain copy 2 of the form.

11. Return the remaining three copies of the form to the purchasing agent.

**The Purchasing Agent**

12. Place the order and notify the vendor to deliver it.

13. Send the original *Requisition-Purchase Order-Claim* form to the receiving officer.

14. Retain copy 3 of the form.

15. Forward copy 4 of the form to the County Road and Bridge Inventory Office/Commissioner's office.

**The Receiving Officer**

16. Complete the *Receiving Report* and then perform the following procedures:
- File the original *Receiving Report*.
- Send one copy of the *Receiving Report* with the invoice attached to the County Clerk.
- Send one copy of the *Receiving Report*, with the original *Requisition-Purchase Order-Claim* form and invoice attached, to the Purchasing Agent.

**The Purchasing Agent**

17. Complete the adjustment amounts and totals on the *Requisition-Purchase Order-Claim* form.

18. File both the *Requisition-Purchase Order-Claim* form and the *Receiving Report*.

**The County Clerk**

19. Complete the consideration for the payment portion of the *Requisition-Purchase Order-Claim* form.

20. Prepare the document package for delivery to the Board of County Commissioners for payment consideration.

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**Purchases of Road Materials from Bid Lists by Blanket Purchase Order**

When a county solicits bids for the purchase of processed native materials for road and bridge improvements, the county may accept all bids received. The county then selects the lowest and best bid from those accepted when a construction project opens. The county should base the selection of the bid upon availability and bid price plus transportation costs.

19 O.S. 2007, § 1505
The Requesting Officer

1. Should state in the bid specifications that one of the following situations exist:
   - Materials are to be delivered to one or more specific locations.
   - Materials are to be picked up at the vendor's location.

Once the bid list is established, the procedures outlined in the section “Blanket Purchase Orders From Bid Lists” in this chapter for the purchasing process and preparation for payment should be followed.

Fuel Purchases from Bid Lists on Blanket Purchase Orders

The Requesting Officer

1. Should state, in the specifications, when establishing the bid list, that one of the following situations applies:
   - Fuel purchased is to be delivered in bulk to one or more specified county fueling stations.
   - Fuel is to be picked up in bulk by the county.
   - Fuel is to be delivered to specified county vehicles at the Vendor's pumps (24-hour access if required).
   - Fuel meets other special requirements peculiar to the county needs.

19 O.S. 2007, § 1505
NOTE: The county commissioners may purchase motor fuel for county use from a cooperative agricultural association in which [one] member of the Board of County Commissioners has a financial or proprietary interest provided that the member abstains from voting on the purchase.

62 O.S. 2007, § 371

Once a fuel bid list is established, the procedures in the section “Purchases from Local Vendors at State Prices” in this chapter should be followed.

If no bids are received from the bid list, the provisions outlined in section “Purchases of Fuel by Telephone Quote” in this chapter should be followed.

**Purchasing When a Vendor is Unable to Provide Items**

When a vendor who has been selected as the lowest and best bidder to furnish a particular item or items to the county during a specified time period is unable to perform, the purchasing agent may take one of the following actions. Each situation should be decided on a case-to-case basis.

- Cancel and re-bid.
- Solicit telephone quotes for the needed item(s) from the list of qualified bidders and purchase the items at the lowest and best quote available.
- Use next lowest bidder.

**NOTE:**

The next time a purchase is made, it must be re-bid and the county can only revert to telephone solicitation if the lowest and best bidder is once again unable to perform, providing the purchase does not exceed $5,000.00.

19 O.S. 2007, § 1501(A)(3)(k)


19 O.S. 2007, § 1505(B)(5)
Purchasing by Telephone Quote

Bid List Solicitation When No Bids Are Received

When bids have been solicited as provided for by law and no bids have been received, the following procedures can be used:

- The Purchasing Agent determines if potential vendors are willing to commit to a firm price for a reduced period of time, and if so, follows the bid procedure.
- If vendors are not willing to commit to a firm price for a reduced period, the purchasing agent solicits and records at least three quotes of current prices available to the county and authorizes the purchase at the lowest and best price.

These quotes must be recorded on SA&I Form No. 4046, Vendor Telephone Quote Sheet, and attached to the purchase order.

NOTE:
The use of telephone quotes permits the purchase of commonly used items for which no response has been received on bid requests when forming a bid list. Telephone quotes may not be used to avoid bidding procedures for purchases exceeding [ $10,000.00. ] Responses on telephone quotes can be made by email.

The following procedures have been adopted for making purchases by telephone quotes:
The Requesting Officer

1. Complete the requisition portion of SA&I Form No. 1116, Requisition-Purchase Order-Claim, indicating an immediate need for the items requested.

2. Forward the document to the Purchasing Agent.

The Purchasing Agent

3. Solicit and record at least three quotes of prices on the Vendor Telephone Quote Sheet.

**NOTE:**

If three quotes are not available, the Purchasing Agent sends a memorandum to the County Clerk, which describes the basis for authorizing the purchase. The County Clerk attaches the memorandum to the County Clerk’s copy of the purchase order and files both in the office.

4. Furnish these quoted prices to the requesting officer.

The Requesting Officer

5. Select the "lowest and best" buy.

6. Submit justification in writing to the Purchasing Agent if the lowest quote is not selected.

**NOTE:**

Any time the lowest quote is not considered to be the lowest and best, the Purchasing Agent records the basis for this decision and transmits it to the County Clerk.
The County Clerk

7. Encumber the funds, assign the purchase order number, and certify the Requisition-Purchase Order-Claim.

The Purchasing Agent

8. Notify the successful vendor.

9. Authorize the purchases.

10. Complete the purchase order portion of the form.

11. Submit the purchase order and quotes to the County Clerk.

**NOTE:**
Telephone quote prices are valid for one time only. New price quotes must be solicited for purchases of the same item made on following days.

The Receiving Officer

12. Receive the purchased items.

13. Prepare SA&I Form No. I-4030, Receiving Report, as on all other purchases.

The purchase order form is processed as outlined in the section “Blanket Purchase Orders from Bid Lists” in this chapter.
**Purchases of Fuel by Telephone Quote**

Purchasing fuel by telephone quote is specifically authorized by statute. The procedures are the same as those in the section “Purchasing From Bid Lists or State Contracts--Blanket Purchase Orders From Bid Lists” in this chapter.  

19 O.S. 2007, § 1501(A)(3)(g)

**Purchases of Food for Prisoners by Telephone Quote**

Using telephone quotes to purchase food for prisoners incarcerated in the county jail is specifically authorized by statute, using the procedures in the section “Purchasing By Telephone Quote--Bid List Solicitation When No Bids Are Received” in this chapter.

NOTE: Counties whose population is 100,000 or more are exceptions.


**Purchasing by Estimate**

**Repairs by Estimate of $2,500.00 or Less of Equipment, Machinery, or Vehicles**

County Departments That Require Repairs of Equipment, Machinery, or Vehicles

1. Make estimates.

19 O.S. 2007, § 1501(B)
2. If the repairs do not exceed $2,500.00, requisition a purchase order from the Purchasing Agent.

**NOTE:**
Repairs exceeding $2,500.00 must be submitted on a blanket purchase order. (See section “Blanket Purchase Orders for Repairs Exceeding $2,500.00 of Equipment, Machinery, and Other Vehicles” in this chapter for procedures.)

**The Requesting Officer**

3. Prepare the requisition portion of the SA&I Form No. 1116, *Requisition-Purchase Order Claim*.

4. Enter the selected vendor in the “Suggested Vendors” box.

5. Enter the equipment to be repaired in the “Quantity, Unit and Description” columns.

6. Enter the amount to be encumbered on the “Amount” line.

7. Attach repair estimates to the *Requisition-Purchase Order Claim*.

8. Retain copy 5 of the form.

9. Forward the remaining four copies of the form to the purchasing agent.

**The Purchasing Agent**

10. Complete the purchase order portion of the form.

11. Forward the *Requisition-Purchase Order Claim* to the County Clerk.
The County Clerk

12. Encumber the funds, assign a purchase order number, and certify and sign the *Requisition-Purchase Order Claim*.

13. Retain copy 2 of the form.

14. Return the remaining three copies of the form to the purchasing agent.

The Purchasing Agent

15. Notify the requesting officer to deliver the equipment back to the vendor for repair.

16. Retain copy 3 of the form and send the remaining two copies to the receiving officer.

The Receiving Officer

17. Inspect the returned equipment to determine that the repairs have been made.


19. Forward the original and Copy 4 of the *Requisition-Purchase Order Claim*, the *Receiving Report*, and the invoice to the purchasing agent.

Processing of forms for payment of claims follows the same procedures as in the section “Purchasing From Bid Lists or State Contracts--Purchases From Local Vendors at State Prices” in this chapter.
Purchases Using Blanket Purchase Orders

Blanket Purchase Orders for Miscellaneous Supplies and Repair Parts

The following procedures apply to using a blanket purchase order for miscellaneous supplies and repair parts:

62 O.S. § 310.8

**The County**

1. Select a vendor for the placement of the blanket purchase order.

The requisition portion of SA&I Form No. 1116, *Requisition·Purchase Order·Claim*, should be prepared in the following manner:

**The Requesting Officer**

2. Prepare the requisition portion of the *Requisition·Purchase Order·Claim*.

3. Check the “Blanket P.O.” checkbox.

4. Select the vendor in the “Suggested Vendors” box.

5. Enter a general description of the type items to be purchased in the “Description” column.

6. Enter the maximum amount to be encumbered, the account number, the date, and the signature.

7. Retain copy 5 of the form.
8. Send the remaining four copies of the form to the purchasing agent.

**The Purchasing Agent**

9. Complete the purchase order portion of the *Requisition-Purchase Order Claim* form.
10. Forward the *Requisition-Purchase Order Claim* form to the County Clerk.

**The County Clerk**

11. Encumber the funds, assign the date and purchase order number, and certify the *Requisition-Purchase Order Claim*.
12. Deliver the *Requisition-Purchase Order Claim* form to the County Road and Bridge inventory Office/Commissioner's office.

**The Board of County Commissioners**

13. Approve the blanket purchase order by either signing the approval in the “Approval” box or by resolution.
14. Return the *Requisition-Purchase Order Claim* form to the County Clerk.

**NOTE:**

Approval by resolution assures the Board that the *Requisition-Purchase Order Claim* must come before them again before final payment of claims.

**The County Clerk**

15. Retain copy 2 of the form.
16. Return three copies of the form to the Purchasing Agent.
The Purchasing Agent

17. Complete the “Charge & Invoice To” box.

18. Notify the vendor of the purchase order number.

19. Retain copy 3 of the form.

20. Send the original of the form to the receiving officer.

21. Send copy 4 of the form to the County Road and Bridge Inventory Office/Commissioner's Office.

The Requesting Officer or Designated Representative

22. May make purchases on the blanket purchase order without further requisitions

23. Must obtain an invoice with each purchase

24. Is responsible for insuring that the encumbered amount is not exceeded

The Receiving Officer


26. Attach invoices to the report.

Consumables (items that can be used up) purchased in lots of $500.00 or more must be included on the consumable [road and bridge] inventory.

27. Retain the original copies of the receiving reports.

19 O.S. 2007, §1505(G)
The Requesting Officer

28. Certify that the amount encumbered is not exceeded when the blanket purchase order is to be closed.
29. Forward written justification with the forms if the amount has been exceeded.
30. Send the original of the *Requisition-Purchase Order Claim* and two copies of the receiving reports with the invoices to the purchasing agent.

The Purchasing Agent

31. Complete the “Adjustment/Amount and Adjustment/Total” columns on the purchase order.
32. Retain the original *Requisition-Purchase Order Claim* and one copy of the Receiving Report.
33. Forward the remaining forms and invoices to the County Clerk.

The County Clerk

34. Prepare the document package for payment.

**NOTE:**

If the blanket purchase order has been approved by resolution of the Board of County Commissioners, it must go back before them for final approval for payment.
**Blanket Purchase Orders for Repairs Exceeding $2,500.00 of Equipment, Machinery, and Other Vehicles**

**The Requesting Officer**

1. Make estimates for the repair(s).

2. Prepare the requisition portion of SA&I Claim No. 1116, *Requisition-Purchase Order-Claim*, indicate the suggested vendor, check on the “Blanket Purchase Order” box, and state the equipment to be repaired and the repairs required.

3. Attach repair estimates to the form.

4. Retain copy 5 of the form.

5. Send the other four copies to the purchasing agent.

The rest of the procedure follows the same steps as those stated in the section on “Purchases Using Blanket Purchase Orders--Blanket Purchase Orders for Miscellaneous Supplies and Repair Parts” in this chapter.
County Sheriff Purchases by Credit Cards

The County Sheriff or Deputy Sheriff may use credit cards to purchase materials, supplies or services necessary and directly related to travel outside the county. The credit card may also be used to purchase fuel inside the county on weekends, nights, or holidays when fuel can't be obtained from the vendor to whom a bid has been awarded.

The credit cards must be issued in the name of the county, not an individual’s name.

The obvious intent of the legislation authorizing credit cards is for the transport of prisoners or investigation outside the county.

NOTE:

Purchases must be limited to the actual expenses associated with travel outside the county. Nothing in the authorizing statute must be construed to exempt any sheriff or deputy sheriff from conforming to the county purchasing procedures.

The County Sheriff

1. May request the Board of County Commissioners to obtain credit cards for use by their department for travel outside the county

The Board of County Commissioners

2. Apply for credit cards [ in the name of the county ] and forward them to the Sheriff’s Department.

The following limitations apply:
In counties with populations of less than 50,000, persons may have no more than two cards and no more than one credit card account from one supplier, and the total combined credit limit for all cards must not exceed $5,000.00.  

In counties with populations between 50,000 and 100,000, persons may have no more than four cards and no more than one credit card account from one supplier, and the total combined credit limit for all cards must not exceed $10,000.00.  

In counties with populations between 100,000 and 450,000, persons may have no more than six cards and no more than one credit card account from one supplier, and the total combined credit limit for all cards must not exceed $15,000.00.  

In counties with populations in excess of 450,000, persons may have no more than 24 cards and no more than one credit card account from one supplier, and the total combined credit limit for all cards must not exceed $60,000.00.

3. Forward the cards to the Sheriff’s Department

The County Sheriff

4. Must remain responsible for the use of the credit cards for authorized travel outside the county

5. Must prepare, on or before the 25th of each month, SA&I Form No. 1116, Requisition-Purchase Order-Claim in the following manner:

- Check the “Blanket P.O.” checkbox.
- Enter the credit card company in the “Suggested Vendor Suggested Vendors” box.
• Enter the maximum amount to be encumbered and account number on the “Amount” line.

Procedures for approving a blanket purchase order and its use are detailed in the section “Purchasing From Bid Lists or State Contracts--Purchases From Local Vendors at State Price” in this chapter.

**The Individuals Using Cards**

6. Obtain receipts. These receipts must be signed by the individual.

7. Give receipts to the receiving officer when they return from the travel.

**NOTE:**

A copy of the credit card charge sheet is not considered a receipt unless it specifies the item(s) purchased and the unit price [and it has the signature of the individual making the purchase].

**The Receiving Officer**

8. Enter required data on SA&I Form No. 112, *County Sheriff’s Credit Card Expenditures*, and SA&I Form No. 1-4030, *Receiving Report*.

   All entries on the form are required by statute.

9. Attach all receipts for credit card purchases to the form.

**The County Sheriff or Designated Deputy Sheriff**

10. Sign the *County Sheriff’s Credit Card Expenditures* form.
11. Attach it, along with the receipts, to the *Requisition·Purchase Order·Claim*.

12. Forward to the purchasing agent for completion and payment.

13. Attach a written justification for over expenditure in the event the authorized encumbered amount is exceeded.

**The Purchasing Agent**

14. Forward the documents to the Board of County Commissioners for approval of payment.

**Purchasing When No Bid is Required**

*Routine Purchases of Less Than [ $10,000.00 ]*

All purchases made under this procedure must use a single purchase order for each item.  

19 O.S. 2007, § 1501(A)(3)(a)

**WARNING:**  
Splitting purchases for the purpose of avoiding competitive bidding and paying an amount in excess of [ $10,000.00 ] is prohibited. Any persons convicted of violating this provision will be guilty of a misdemeanor and will forfeit their position or office.

**The Requesting Officer**

1. Prepare the requisition portion of the *Requisition·Purchase Order·Claim* form.

   A detailed description of the item(s) in the “Description column” is essential to making sure the correct item(s) is purchased.
2. Retain Copy 5 of the form.

3. Forward the remaining four copies to the purchasing agent.

**The Purchasing Agent**

4. Record the date.

5. Begin the purchasing action within two days by checking prices with the suggested vendor and other likely sources.

6. Furnish prices quoted and vendors to the requesting officer.

**The Requesting Officer**

7. Select the vendor.

8. Notify the purchasing agent of the selection.

**The Purchasing Agent**

9. Complete the purchase order portion of the *Requisition-Purchase Order-Claim* form.

10. Deliver the form to the County Clerk.

**The County Clerk**

11. Encumber the funds, assign the date and the purchase order number, and certify the purchase order.

12. Retain copy 2 of the form.

13. Return the remaining three copies to the Purchasing Agent.
The Purchasing Agent

14. Order item(s) from the vendor.
15. Retain copy 3 of the form
16. Forward copy 4 to the County Road and Bridge Inventory Office/Commissioner's Office.
17. Send the original to the receiving officer.

The Receiving Officer

18. Receive the item(s).
19. Obtain the delivery invoice.
21. File a copy of the form.
22. Send one copy of the form to the County Clerk along with the delivery invoice.
23. Send one copy, along with the original Requisition-Purchase Order-Claim, to the purchasing agent.

The Purchasing Agent

24. Complete any adjustment of the Total Adjustment/Amount and Adjustment/Total columns.
25. File original Requisition-Purchase Order-Claim and one copy of the receiving report.
26. Send one copy of the *Receiving Report* and the delivery invoice to the County Clerk.

**County Clerk**

27. Prepare the document package for payment.

28. Send document package to the County Road and Bridge Inventory Office/Commissioner's office for consideration for payment.

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### Purchase from a Single Source

**The Requesting Officer**

1. Prepare justification for making a single source purchase.  

2. Insure that the goods or service can only be supplied by one source, if more than [ $10,000.00 ] is to be spent.

    **NOTE:** Single source items are very rare. Often, the only sure way to make this determination is to open the purchase for bid.

Once it is verified that only one vendor is able to supply the goods or service, the procedures in the section “*Purchasing When No Bid is Required—Routine Purchases of Less than [ $10,000.00 ]*” in this chapter are followed.

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### Purchase at Public Auction

The county officer should attempt to purchase the desired items prior to the auction when purchases are made at a public auction.
NOTE:
Attempts to purchase prior to the auction can only be made at state auctions.

Such purchases should follow the same procedures as a Single Source purchase in the section above “Purchase From A Single Source.”

The County Officer or a Representative

1. An on-site inspection is recommended prior to the date of an auction to determine the maximum amount to be paid for each item for which they plan to bid.

The Requesting Officer

2. Prepare SA&I Form No. 1116, *Requisition-Purchase Order-Claim* in the following manner:

3. Enter the type of auction in the “Suggested Vendors” box.

4. Indicate that the material is to be picked up by the county in the “Ship To” box.

5. Describe the items to be purchased in the “Description” column.
   All items should be put on one *Requisition-Purchase Order-Claim*. Each item should be described as specifically as possible.

6. Enter the maximum bid, if desired, to be made on each item described in the “Amount To Be Encumbered” column.
NOTE: Each item does not have to have an amount specified. The 
Requisition-Purchase Order-Claim has a total maximum amount that 
cannot be exceeded.

7. Prepare the remainder of the requisition portion as normal.
8. Retain one copy of the form.
9. Forward the other four copies of the form to the purchasing agent.

The Purchasing Agent

10. Complete the purchase order portion of the Requisition-Purchase 
Order-Claim form, indicating public auction as the vendor in the 
“Suggested Vendors” box.
11. Deliver the Requisition-Purchase Order-Claim form to the County 
Clerk.

The County Clerk

12. Encumber the funds, assign the date and purchase order number, and 
certify the Requisition-Purchase Order-Claim. 
13. Retain copy 2 of the form.
14. Return the remaining three copies of the form to the purchasing agent.

The Purchasing Agent

15. Complete the “Charge and Invoice To” box.
16. File copy 3 of the form.
17. Send copy 4 to the County Road and Bridge Inventory Office/Commissioner's office.

**Individuals Attending the Auction**

18. Should take a copy of the encumbered and certified purchase order to the auction for verification

**NOTE:**
The amount bid on a single item cannot exceed the amount indicated in the "Amount to be Encumbered" (Block 12) of the purchase order.

The remaining procedures follow the same path as in the section on “Purchasing When No Bid is Required--Routine Purchases of Less Than $10,000.00” in this chapter.

**Purchasing Equipment through State Purchasing Division Using Trade-in**

**The Requesting Officer**

1. Prepare the requisition portion of SA&I Form No. 1116, *Requisition-Purchase Order-Claim*. 19 O.S. 2007, § 339(C)

2. Indicate in the “Suggested Vendors” box that the purchase is to be made through the State Purchasing Division, Department of Central Services.

3. State the maximum amount to be encumbered in the “Amount To Be Encumbered” column.

4. Enter the account number to be charged on the "Account Number” line.
5. Indicate whether the purchase is to be an outright purchase, lease, or lease-purchase, and provide detailed specifications of both of the following:
   - Equipment to be purchased
   - Equipment to be traded on the “Description” column

6. Retain copy 5 of the form.

7. Forward the remaining four copies of the form to the purchasing agent.

The Purchasing Agent

8. Complete the purchase order portion of the *Requisition-Purchase Order-Claim* form.

9. Deliver the *Requisition-Purchase Order-Claim* form to the County Clerk.

The County Clerk

10. Encumber the funds, assign the purchase order number, and certify the *Requisition-Purchase Order-Claim*.

11. Retain copy 2 of the form.

12. Return the remaining three copies of the form to the purchasing agent.

The Purchasing Agent

13. Provide a copy of the purchase order, with a letter to State Purchasing Division, Department of Central Services, requesting that the purchase be made by their office.
State Central Purchasing

14. Solicit bids for the equipment, clearly specifying the trade-in.

15. Notify the county, recommending a "best buy," after bids are received.

The Requesting Officer

16. Either accept or reject the recommendation after the bids are received.

**NOTE:**

Requesting officers may only accept or reject recommendations from the State Purchasing Division. No provisions exist, as they do in purchasing through the county purchasing act, of justifying a "best buy" based upon experience and history. If the bid is rejected, there is no further action on that purchase.

If the recommendation is accepted the following procedures must be followed:

The Purchasing Agent

17. Complete the purchase as in the section on “Purchasing When No Bid is Required—Routine Purchases of Less Than [ $10,000.00 ]” in this chapter.
Purchases from a State Agency or Political Subdivision of the State

The Board of County Commissioners

1. Must pass a resolution to buy or sell. 

2. Complete the requisition portion of the Requisition-Purchase Order-Claim. (19 O.S. 2007, § 421.1(C))

3. Indicate the state agency or political subdivision from which the purchase is being made in the “Suggested Vendors” box.

4. Enter the agreed upon price in the “Unit Price” column.

5. Retain copy 5 of the form.

6. Send remaining four copies of the form to the purchasing agent.

NOTE: The requesting officer is responsible for verifying that the organization from which the item is being purchased is subject to the Oklahoma Central Purchasing Act or similar competitive bidding procedures. A statement of verification and the agreed-upon price must be attached to the purchase order.

The procedure from this point is the same as in the section on “Purchasing When No Bid is Required--Routine Purchases of Less Than [ $10,000.00 ]” in this chapter.
**Service or Maintenance Contracts**

**The Requesting Officer**

1. Prepare the requisition portion of the *Requisition-Purchase Order-Claim*.

2. Indicate the contract number, vendor, and a brief description of the service in the “Description” column.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent.

**NOTE:**

Service or maintenance contracts on equipment or machinery entered into at the time of purchase do not require bidding, regardless of cost. Renewal of these contracts does not require bidding, provided the contract contains a renewal clause. Other service or maintenance contracts must be bid if the costs exceed \[ $10,000.00 \] per year.

The procedure from this point is the same as in the section on “Purchasing When No Bid is Required—Routine Purchases of Less Than \[ $10,000.00 \]” in this chapter.

**Contracting for Professional Services**

**Requesting Officer**

1. Prepare the requisition portion of *SA&I Form No. 1116, Requisition, Purchase Order-Claim*.

74 O.S. § 85.2(10)
AG Opinions 80-269
2. Describe the professional service to be received and the provider of the service in the “Description column”.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent.

**NOTE:**

The requesting officer is responsible for verifying that the service being provided meets the requirements of statutes concerning "professional services." The Board of County Commissioners must approve and sign the contract.

The procedure from this point is the same as in the section on “Purchasing When No Bid is Required—Routine Purchases of Less Than [ $10,000.00 ]” in this chapter.

**Purchasing Material for Road or Bridge Improvements ($3.00 or less per cubic yard or ton)**

**The Requesting Officer**

1. Prepare the requisition portion of the *Requisition-Purchase Order-Claim* form.

2. Indicate the type of unprocessed native material to be purchased in the “Description” column.

3. Complete the “Quantity” column.

4. Complete the “Unit” column.

5. Enter the “Unit Price” column.
6. Enter the amount in the “Amount To Be Encumbered” column. The unit price can not exceed $3.00 per cubic yard or per ton.

7. Retain copy 5 of the form.

8. Forward the remaining four copies of the form to the purchasing agent.

The procedure from this point is the same as in the section on “Purchases When No Bid is Required—Routine Purchases of Less Than [ $10,000.00 ]” in this chapter.

Contracting for Insurance

The Requesting Officer

1. Prepare the requisition portion of the Requisition-Purchase Order-Claim form.

2. Indicate the specific insurance being purchased in the “Description” column.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent for processing.

The procedure from this point is the same as in section as in the section on “Purchasing When No Bid is Required—Routine Purchase of Less Than [ $10,000.00 ]” in this chapter.
Emergency Purchases

Emergency Purchases When a County Officer Declares an Emergency

If county officers certify the existence of an emergency that requires the immediate expenditure of funds, they may waive regular purchasing procedures. Expenditures for emergency purchases cannot exceed $5,000.00.

NOTE:
The procedure for the encumbrance of an emergency purchase order should begin at the beginning of the next business day after the emergency is declared.

The County Officer

1. Certify in writing that an emergency exists that requires the immediate expenditure of funds up to $5,000.

NOTE:
When a county officer declares an emergency, counties can lease specialized road machinery or equipment without a contract when it is required for projects of short duration not to exceed thirty days.

2. Expend the funds.

3. At the beginning of the next business day, begin the process to encumber the funds and generate a Requisition-Purchase Order-Claim.

4. Obtain a receipt or delivery invoice.
The Receiving Officer

5. Receive the item(s).
7. File the original report.
8. Give all other copies, with the invoice or receipt, to the county officer.

The County Officer/Requesting Officer

9. Prepare the requisition portion of SA&I Form No. 1116, Requisition-Purchase Order-Claim.
10. Retain copy 5 of the form.
11. Forward the remaining four copies of the form to the purchasing agent, along with the certification of emergency, receipt or delivery invoice, and remaining copies of the receiving report.
12. Retain copies of all documents.

An Emergency Declared by the Governor

NOTE:
An emergency is defined as any occasion or instance for which, in the determination of the President of the United States or the Governor of the State of Oklahoma, federal or state assistance is needed to supplement state and local efforts and capabilities to save lives, and to protect property and public health and safety, or to lessen or avert the threat of a catastrophe in any part of the state.

63 O.S. 2007, § 683.3
When the Governor declares an emergency in a county, the district attorney has the authority to temporarily waive competitive bidding procedures for purchases that may expedite a response to the emergency situation.

**A Emergency Management or Disaster Emergency Declared by the President or the Governor**

When a state of emergency is declared by the U.S. President or the Governor due to enemy attack or disaster, county entities may incur obligations necessary to combat the disaster, protect the health and safety of persons and property, and provide emergency assistance to victims without regard to purchasing processes and formalities prescribed by law.

**An Emergency Declared by the Governing Body of a Public Agency under the Public Competitive Bidding Act**

When the governing body of a public agency declares, by 2/3 majority vote, an emergency, the Public Competitive Bidding Act does not apply to any contracts of $35,000.00 or less.

**Purchasing When Bidding is Required**

**WARNING:**

Splitting purchases for the purpose of avoiding competitive bidding and paying an amount in excess of $10,000.00 is prohibited. Any persons convicted of violating this provision will be guilty of a misdemeanor and will forfeit their position or office.
Routine Purchasing of Over [$10,000.00]

The Requesting Officer

1. Prepare the requisition portion of the *Requisition-Purchase Order-Claim*. 19 O.S. 2007, § 1505(A)

2. Enter a full and complete description in the “Description” column.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent.

The Purchasing Agent

5. Begin the bidding process and obtain state contract prices within two days of receipt of the requisition. 19 O.S. 2007, § 1505(A)(3)

6. Solicit bids at least ten days prior to bid opening.

7. Mail written notices with a blank *SA&I Form No. 4040, Invitation to Bid* (with a noncollusion affidavit on the back side), to all persons or firms who have submitted a written request that they be notified. 19 O.S. 2007, § 1505(B)(2)

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**NOTE:**
If the vendor has its own bid forms and chooses not to use the *Invitation to Bid* form, *SA&I Form No. 425, Affidavit for Filing with Competitive Bid* may be used for the noncollusion affidavit.

8. Mail notices with a blank *Invitation to Bid* (with a noncollusion affidavit on the back side) to others reasonably expected to submit bids.
9. Publish a notice, at least ten days prior to the bid opening, in a newspaper of general circulation in the county. The notice should include a statement that an *Invitation to Bid* (with a noncollusion affidavit on the back side) is required with the bid.

**NOTE:**
Proof of mailing must be made a part of the official records of the purchasing agent.

10. Forward all sealed bids from vendors, along with the state contract price when available, to the County Clerk.

**The County Clerk**

11. Forward all sealed bids and state contract price to the Board of County Commissioners.

**The Board of County Commissioners**

12. Open the bids in a scheduled open meeting.

13. Compare the bids with the state contract price.

14. Ensure the *Invitation to Bid* is included and that the noncollusion affidavit on the back side of the form is signed and notarized.

15. Forward copies of the bids to the requesting officer for review and recommendation.

**The Requesting Officer**

16. Review the bids.
17. Recommend a vendor in writing to the Board of County Commissioners.
18. State the reasons for the selection if the lowest bid is not recommended.

The Board of County Commissioners

19. Select the lowest and best bid within thirty days of bid opening.
20. State the reasons in a written letter to the requesting officer and purchasing agent if the recommended vendor is not selected.
   The reasons for not selecting the low bid must be included in the minutes of the board meeting.

The Purchasing Agent

21. Complete the purchase order portion of the Requisition-Purchase Order-Claim, upon receiving the board's decision.
22. Forward the form to the County Clerk.

The County Clerk

23. Encumber the funds, assign the date and purchase order number, and certify the Requisition-Purchase Order-Claim.
24. Retain copy 2 of the form.
25. Return the remaining three copies of the form to the purchasing agent.

The Purchasing Agent

26. Notify the successful bidder.
27. File a copy of the notification in the purchasing agent records.
28. Retain copy 3 of the form.
29. Forward the original form to the receiving officer.

**The Receiving Officer**

30. Receive the purchased item(s).
31. Complete the *Receiving Report*.
32. Obtain a delivery invoice.
33. Retain the original and one copy of the *Receiving Report*.
34. Send a copy of the delivery invoice to the County Clerk.
35. Send one copy of the receiving report to the County Clerk.
36. Forward the original copy of the *Requisition-Purchase Order-Claim* and a copy of the delivery invoice to the purchasing agent.

**The Purchasing Agent**

37. Complete the “Adjustment/Amount” column of the *Requisition-Purchase Order-Claim*.
38. Complete the “Adjustment/Total” column.
39. File the documents.

**The County Clerk**

40. Complete “Consideration for Payment” line on the *Requisition-Purchase Order-Claim*. 
41. Complete the “Date Returned for Filing” line.

42. Prepare the document package (including the Requisition-Purchase Order-Claim, the Receiving Report, and the invoice), which is held in the County Clerk’s office for five days after the presentation of payment.

   Exceptions to the five-day rule are salaries, travel, and utilities.

19 O.S. 2007, § 1505(F)(1)

The Board of County Commissioners

43. Indicate approval by completing the “Approved Amount” column.

44. Sign the purchase order.

45. Enter the date in the “Approval” box on the purchase order and forward it to the County Clerk to process for payment.

The County Clerk

46. Indicate the warrant number.

47. Enter the amount.

48. Enter the date.

49. Enter the appropriation account number.

50. Sign the document.

51. Prepare a warrant for payment.

52. Forward the warrant to the vendor.
**Purchasing Processed Native Materials for Road and Bridge Improvements by Individual Bid**

An attempt should be made to combine the needs of all districts in ordering processed native material for road and bridge repair and maintenance. Buying in bulk for the entire county can often result in savings of 10 to 12 percent. Specifications can be written that call for delivery at various places at specified times.

**NOTE:**

Purchases that will exceed [ $10,000.00 ] during the year require bidding, regardless of whether the purchases are made in one large buy or in several smaller ones.

**The County**

- When a county solicits bids, the county must accept all bids received.
- Must base the selection of the bid on the following items:
  - availability
  - bid price
  - transportation cost

The procedures to follow are exactly the same as those described in the section on “Purchasing When Bidding is Required--Routine Purchases of Over [ $10,000.00 ]” in this chapter.
When computer systems are being purchased, splitting purchase orders is a violation of the County Purchasing Act. The purchase of a computer system (which might consist of a CPU, monitor, operational software and printer as an example) where the combined total exceeds $10,000.00 requires bidding. Buying these components separately to avoid bidding is a violation of the County Purchasing Act.

The fine line can best be explained by saying: purchasing by the use of more than one purchase order for the purpose of avoiding bidding constitutes violation of the County Purchasing Act. See “Warning” under “Purchasing When Bidding is Required, in this chapter.”

A contract with a computer information service company for providing computer services for a monthly fee or a per-instrument fee (including the transfer to and use by the county of computer software and/or hardware) must be competively bid under the County Purchasing Act if none of the statutory exemptions apply. An exception is when the hardware and software the county receives and uses are entirely incidental to the services provided.

The procedures to follow are exactly the same as those described in the section on “Purchasing When Bidding is Required--Routine Purchases of Over $10,000.00” in this chapter.

Otherwise, the purchase can be made by following the procedures in “Purchasing When No Bid is Required--Routine Purchases of Less Than $10,000.00” in this chapter.
[ Incentive Awards for Safety Related Job Performance ]

[ The County Officers ]

Determine which employees in their office are eligible to receive an incentive award for safety-related job performance, subject to approval by the Board of County Commissioners.

[ The Board of County Commissioners ]

Purchase, rent, or lease-purchase uniforms, safety devices and equipment for the officers and employees of the county, and provide incentive awards for safety-related job performance.

[ NOTE 1: Employees can be recognized once each calendar year only, and the awards can not exceed the value of $250.00. ]

[ NOTE 2: County officers are not eligible to receive safety-related incentive awards. ]

Determine for the awards to be paid from the general county funds or any county highway funds.
Chapter Five

Purchasing By Situation: Rental, Lease, or Lease-Purchase

Debbie Greenfield (standing), Lincoln County Clerk, and Brenda Danken, First Deputy and Purchasing Agent, prepare to look over a lease-purchase agreement.

Rental, Lease, or Lease-Purchase are methods allowed in the County Purchasing Act for acquiring equipment.
Any agreement to lease-purchase real or personal property must state the purchase price of the property. The lease can not be extended to cause payment of more than the stated purchase price plus interest, not to exceed ten percent simple interest.

Any agreement to lease-purchase real or personal property must state the purchase price of the property. The lease can not be extended to cause payment of more than the stated purchase price plus interest, not to exceed ten percent simple interest.

Rental, Lease, or Lease Purchase Situations

All rental or lease-purchase agreements must be in contract form and must be approved by the District Attorney and signed by the Board of County Commissioners. SA&I Form No. 120B, Lease Purchase Agreement for Equipment, must be used for the contract.

When a county officer declares an emergency, counties can lease specialized road machinery or equipment without a contract when it is required for projects of short duration not to exceed thirty days.

Rental or Lease-Purchase at [Current Bid Limit] or Less for Equipment Other Than for Road and Bridge

The Requesting Officer

1. Prepare the requisition portion of SA&I Form No. 1116, Requisition-Purchase Order-Claim.

2. Indicate in the “Description” column whether the equipment is to be rented or lease-purchased and the proposed terms for payment.

3. Retain copy 5 of the form.
4. Forward the remaining four copies of the form to the purchasing agent.

**NOTE:**
The total cost of a rental can not exceed [the current bid limit] per year or a lease-purchase can not exceed the same amount totally if this procedure is to be used. Any contract for payment should be reviewed and approved by the District Attorney and must be signed by the Board of County Commissioners.

The procedures to follow are exactly the same as those described in the section “Purchasing When No Bid is Required: Routine Purchases of Less Than [ $10,000.00 ]” in Chapter Four, *Purchasing By Situation*.

---

**Rental or Lease-Purchase at More Than [the Current Bid Limit] for Equipment Other Than for Road and Bridge**

**The Requesting Officer**

1. Prepare the requisition portion of the *Requisition-Purchase Order-Claim* form.  

19 O.S. 2007, § 1501(A)(3)

2. Indicate in the “Description” column whether the item is to be rented or lease-purchased, and the proposed terms of payment.

The procedures to follow are exactly the same as those described in section “Purchasing When Bidding is Required—Routine Purchases of Over [ $10,000.00 ]” in Chapter Four, *Purchasing By Situation*. 
Lease or Lease-Purchase of Road Machinery and Equipment through the County Road Machinery and Equipment Revolving Fund

Any county with insufficient funds during a fiscal year to purchase road and bridge equipment outright is eligible to request the lease or lease-purchase of such equipment through the Oklahoma Department of Transportation (ODOT) from the County Road Machinery and Equipment Revolving Fund.

The Requesting Officer

1. Contact the Local Government Division of the Oklahoma Department of Transportation for rules and regulations regarding procedures for the lease or lease-purchase of road machinery and equipment through the County Road Machinery and Equipment Revolving Fund.

Full Warranty Lease of Road Machinery and Equipment

NOTE:

Black's Law Dictionary defines full warranty as: "A warranty as to full performance covering generally both labor and materials. Under a full warranty, the warrantor must remedy the consumer product within a reasonable time and without charge after notice of a defect or malfunction."

The Board of County Commissioners

1. Pass a resolution to enter into a full warranty lease for a specified piece of road and bridge machinery or equipment.
NOTE:
Lease agreements can only be made for periods not to exceed one year or from the date of delivery to the end of the current fiscal year with the option to renew, provided adequate funds are appropriated during the fiscal year for that purpose.

The Requesting Officer

2. Prepare the requisition portion of the *Requisition*-*Purchase Order*-*Claim* form.

3. Indicate a full warranty lease in the “Suggested Vendors” box. \[69 \text{O.S. § 636.3(F)}\]

4. Complete specifications in the “Description” column.

5. Retain copy 5 of the form.

6. Forward the remaining four copies of the form to the purchasing agent.

The Purchasing Agent

7. Prepare and forward a bid package to the State Auditor & Inspector (SA&I) within two days.

The bid package must consist of the following items:

- SA&I Form No. 120A, *Full Warranty Lease*
- A resolution to lease as passed by the Board of County Commissioners
- The complete specifications
- The terms that the county wishes to enter
A bid request, such as the sample shown in Figure 5-1, is suggested by the SA&I.

**NOTE:**
The 1500 hours stated in paragraph A on the sample *Bid Request* is only a suggested value, and counties are not required to use that figure.

### The State Auditor and Inspector

8. Review the bid package for compliance with the statutes.  
   69 O.S. § 636.3(F)

9. Forward the bid package to the Purchasing Director, State Purchasing Division, Department of Central Services if it is in compliance.

10. Return the bid package to the county for additional information if it is not in compliance.

### The State Purchasing Division

11. Solicit bids for the full warranty lease.

12. Notify the county of the recommended vendor for awarding of the contract after bids are opened.

### The Board of County Commissioners

13. Either accept or reject the recommended vendor in an open meeting.

14. Contact the selected vendor and obtain a lease contract on SA&I Form No. 120A, *Full Warranty Lease*, for submission to the District Attorney for review and procedural approval if the vendor is accepted.

15. Continue with the purchasing process as detailed in “*Purchasing When No Bid is Required—Routine Purchases of Less Than [$10,000.00]*)” in Chapter Four, *Purchasing By Situation*.
Bid Request

FROM: Board of County Commissioners

___________________ County Courthouse

P. O. Box ____________ , OK _________

The equipment described on the attachment to this document will be leased by the Board of County Commissioners of _________________ County, Oklahoma.

A. The machine is to be leased on a fully maintained basis for a period of one (1) year or from date of delivery to end of the current fiscal year with the option to renew for up to two (2) consecutive one (1) year periods. Five thousand five hundred (1500) hours will be the maximum amount of service on a leased machine during the course of a year.

B. County will be responsible for providing daily and scheduled lubrication according to manufacturer guidelines. County will also provide tires and ground engaging tools.

C. The machine will be covered with all risk insurance coverage and will name the vendor as loss payee. Vendor will retain a copy of the insurance endorsement.

D. County will also be responsible for any repairs due to abuse, accident, or neglect.

E. County must return machine to vendor at end of this lease with normal wear and tear accepted. Should a disagreement occur over what was normal wear, the county must appoint one (1) qualified person to represent them. The vendor must appoint one (1) qualified representative. These people in turn must appoint one (1) person, making a total of three (3) persons whose decisions must be binding on both parties.

F. The vendor will schedule a physical inspection of the machine at least once every six months. The vendor and county will document any and all findings in regard to the condition of the machine.

G. If machine is inoperable for more than 72 hours (excluding weekends and holidays) after notification to supplier, the vendor must provide a comparable size machine to the county at his own expense, delivered to job-site in county to be used until repairs are made on county machine or reimburse the county at the rate of $100.00 per working day until the machine is operable.

H. The equipment must be new and the latest current production model. Modifications of existing models or specifications to meet these requirements will not be acceptable. The unit must be complete, fully serviced and ready to operate when delivered to the county yard.

I. The successful vendor will provide the county with one day of technical instruction on the operation of the machine and the preventive maintenance procedures recommended by the manufacturer. This service must be provided within thirty (30) days after delivery of the machine and at a time and place specified by the County Commissioner.

J. The successful vendor must provide at his own expense, a trained service representative to instruct the mechanic and operators on the care and operation of the machine. The County Commissioner receiving this unit will assign training at the time this unit is put into actual operation.

K. The successful vendor must furnish one (1) operator instruction manual and one (1) parts book per machine.

If any of the terms of the full warranty lease are not understood or agreeable the vendor must note such in the vendor's statement.

Dated this _____ day of __________________________ 20 ____.     Board of County Commissioners

____________________________ , Chairman

____________________________ , Member

____________________________ , Member

Lessee (County)  ____________________________

Lessor (Vendor)

Figure 5-1. Sample Bid Request
**Lease or Lease Purchase of Road Machinery and Equipment Directly from the Vendor**

**The Requesting Officer**

1. Prepare the requisition portion of the *Requisition-Purchase Order-Claim* form.

2. Indicate the suggested vendors and the desire to enter into a lease or lease-purchase agreement in the “Suggested Vendors” box.

3. Retain copy 5 of the form.

4. Forward the remaining four copies of the form to the purchasing agent.

**Purchasing Agent, County Clerk, and Board of County Commissioners**

5. Follow the bidding procedures detailed in “Purchasing When Bidding is Required—Routine Purchases of Over $10,000.00” in Chapter Four, *Purchasing By Situation*.

**NOTE:**

A blank copy of SA&I Form No. 120B, *Lease Purchase Agreement For Equipment*, must accompany the request for bid with instructions to the vendor that the form must be completed and signed by the lessor. The form must be returned with the bid and becomes the basis for future payments. The term of any lease or lease-purchase agreement may not extend beyond the end of any fiscal year, with an option to renew subject to adequate funds being appropriated during subsequent fiscal years for the purpose of renewing the agreement (funding out clause).
Upon receipt of the board's decision, the following actions should take place:

**The Purchasing Agent**

6. Complete the purchase order portion of the *Requisition-Purchase Order-Claim* form.

7. Retain the purchase order until it is approved by the SA&I.

8. Send a copy of the *Lease Purchase Agreement for Equipment* form, which has been signed by the accepted lessor and the Board of County Commissioners, to the SA&I for review and approval [before any agreement is made by the County Purchasing Agent].

9. Continue the purchasing procedures after the SA&I approves the purchase order and returns it by following the steps found in the section “Purchasing When Bidding is Required--Routine Purchases of Over $10,000.00” in Chapter Four, *Purchasing By Situation*.

**The County Clerk**

10. Prepare the warrant to pay for the first installment only.

11. Prepare warrants to pay installments as they are due.
Chapter Six

Purchasing By Situation:
Purchasing With Other Counties

Several different purchasing situations may be encountered in counties. This chapter discusses one of those situations, purchasing with other counties, and outlines the procedures to follow.
Purchasing With Other Counties

Counties may jointly purchase items with other counties under certain situations defined in the statutes.

Purchasing Items with Other Counties

A group of contiguous counties may purchase items together providing the following procedures have been followed:

- The item(s) have been competitively bid.
- The notice to bidders lists each county that may participate in the purchase of the item(s) being bid.
- The notice of bid is advertised, as provided by statute, in each of the counties that may participate in the purchase of the item(s) being bid.
- All vendors on the list of qualified bidders of each participating county who offer the item(s) for sale receive notice of the bid request.
- The vendor awarded the bid is willing and able to provide the item(s) at the bid price.

Purchasing Heavy Equipment with Other Counties

The Board of County Commissioners has the authority to jointly purchase heavy equipment with other counties and to loan or lease such equipment across county lines.
In purchasing heavy equipment with other counties, the entities listed below have the responsibilities indicated.

**All Boards of County Commissioners Involved**

1. Agree to the equipment to be purchased and to the specifications
2. Select one county as the primary county in the purchasing transactions.
   The agreement should be in writing and include provisions for the following items:
   - Fuel
   - Maintenance
   - Storage
   - Disposal
   - Leasing to other counties
   - Allowing member counties to withdraw
   - Percentage of cost each county will bear
   - Repairs
   - Scheduling
   - Parts
   - Labor
   - Any other points that are considered necessary

The casting and counting of votes during a joint board meeting should be thoroughly explained.

The agreement should be in the form of a contract and should be reviewed by the District Attorney in the county.
Note:
Counties that desire to obtain heavy equipment through this procedure are strongly encouraged to discuss the process with personnel from the Office of the State Auditor and Inspector, who are well acquainted with purchasing, accounting, and inventory procedures.

Each Board of County Commissioners

3. Must pass a resolution accepting the terms of the agreement

Each Board (Requesting Officer)

4. Prepare the requisition portion of SA&I Form No. 1116, Requisition-Purchase Order-Claim, for the agreed upon portion of the purchase.

5. Indicate in the “Description” column that this is a joint purchase with other named counties.

6. Retain Copy 5 of the form.

7. Forward the remaining four copies of the form to the purchasing agent of the individual counties.

The Purchasing Agent

8. Forward a reproduced copy of the Requisition-Purchase Order-Claim form and a copy of the resolution to the primary purchasing agent within two days.

9. Proceed with bidding procedures as detailed in “Purchasing When Bidding is Required—Routine Purchases of Over [ $10,000.00 ]” in Chapter Four, Purchasing By Situation.
Proof of mailing is made a part of the official records of the primary purchasing agent.

10. Forward all sealed bids along with state contract prices to the primary County Clerk.

The Primary County Clerk

11. Forward all documents to a joint meeting of all Boards of County Commissioners (hereafter referred to as the Joint Board).

The Joint Board

12. Open the bids in an open meeting.

13. Compare them with the state contract price.

14. Ensure that the required noncollusion affidavit is present and signed.

   A noncollusion affidavit is located on the back side of SA&I Form No. 4040, Invitation to Bid. [If vendors use their own bid forms, SA&I Form No. 425, Affidavit for Filing With Competitive Bid, can be used for the noncollusion affidavit.]

15. Furnish a copy of each bid to each Board of County Commissioners.

16. Select the lowest and best bid within thirty days of the bid opening.

17. Prepare a statement of explanation, which becomes a part of the minutes of the meeting, in the event the lowest bid is not selected.

18. Forward a copy of the joint board's decision to each county purchasing agent.
Each County Purchasing Agent and County Clerk

19. Follow the procedures found in “Purchasing When Bidding is Required—Routine Purchases of Over [ $10,000.00 ]” in Chapter Four, *Purchasing By Situation*.

Each County Purchasing Agent

20. Forward the original, copy 4, and a reproduced copy of the *Requisition-Purchase Order-Claim* form to the primary purchasing agent.

The Primary Purchasing Agent

21. Notify the successful vendor.

22. Maintain a copy of the notification as a part of the permanent records of the joint purchase.

23. File a copy of the reproduced *Requisition-Purchase Order-Claim* form from each county.

24. Send the receiving officer designated by the Joint Board the original copy of this form from each county.

25. Forward all the copy 4’s of this form to the Joint Board.

The Designated Receiving Officer

26. Receive the item.

27. Obtain a delivery invoice from the delivering vendor.

29. Retain the original copy of the *Receiving Report*.

30. Send one copy of the *Receiving Report* and the delivery invoice to the primary County Clerk.

31. Send one copy of the *Receiving Report*, along with the original copies of the *Requisition-Purchase Order-Claim* forms from each county and a copy of the delivery invoice, to the primary purchasing agent.

**The Primary County Clerk**

32. Forward reproduced copies of the *Receiving Report* and delivery invoice to each County Clerk.

33. Retain the copies received from the designated receiving officer as permanent joint records.

**The Primary Purchasing Agent**

34. Retain the following items as permanent joint records:
   - Reproduced copies of the original of the *Requisition-Purchase Order-Claim* form from each county
   - A copy of the *Receiving Report*
   - The delivery invoice

35. Forward the following items to each county purchasing agent:
   - The original of the *Requisition-Purchase Order-Claim* form from each county
   - A copy of the *Receiving Report*
   - A copy of the delivery invoice
Each County Purchasing Agent, County Clerk, and Board of County Commissioners

36. Follow the procedures found in the section on “Purchasing When Bidding is Required—Routine Purchases of Over [ $10,000.00 ]” in Chapter Four, *Purchasing By Situation*

**NOTE:** Items purchased using this procedure are placed on the capital asset inventory of each county in proportion to the percentage of the cost the county shares.

The Inventory Officers of Each County

37. Determine the inventory identification number that would be assigned to the equipment as if it belonged to that county alone.

38. Forward that ID number to the primary inventory officer.

The Primary Inventory Officer

39. Mark the inventory identification number of each county on the piece of heavy equipment.
Writing specifications is a way of describing to a supplier the item(s) being requested. The supplier reading the description is trying to understand the desired item(s) from written words only. Therefore, accurate and complete specifications for the item(s) are imperative.
For example, an officer needs a new number two, wooden, lead pencil. The officer tells the Purchasing Agent "I need a new pencil." Without the other information, the Purchasing Agent may not order the same pencil that the officer needs.

If the officer tells the Purchasing Agent, "I need a new number two, wooden, lead pencil," the chances of receiving that specific item become much greater.

The more complex the item(s) for which specifications are being written, the more accurate and complete the description should be to make sure the supplier can fully understand the intended meaning. Otherwise, the item(s) received may not be what is expected.

**Types of Written Specifications**

Specifications can normally be divided into three types:

- Performance specifications
- Dimension specifications
- A combination of performance and dimension specifications

**Performance Specifications**

Performance specifications describe tasks or work that needs to be accomplished versus providing specific product dimensions or information. The order specifies the exact work that the product being purchased needs to do. The supplier then recommends which product would best meet the performance specifications. The supplier provides the dimension specifications.
NOTE: Performance specifications must be written in great detail with exact descriptions of each element of the task, to prevent misunderstandings, and to prevent problems for those evaluating the responses.

Performance specifications should always state requirements for the following details that need to be met before final payment is made, and include any penalties to be imposed for failing to meet those specifications.

- Warranty
- Maintainability
- Support
- Performance periods

The following examples show where performance specifications might be used:

- Simple road construction projects
- Courthouse janitorial services
- Fence construction
- Tree removal
- Grounds upkeep
- Simple repair projects
Dimension Specifications

Dimension specifications are used to describe the specific characteristics of a product. For example, dimension specifications could be used to describe a pickup truck (for items such as engine size, wheel base, transmission, wheel drive size, and bed size).

Dimension specifications should include a thorough and complete detailed listing of dimensions. The more complex the item, the greater the need for detailed dimensions.

Another example is the pencil mentioned earlier. Many different types of number two wooden, lead pencils are available. One pencil may have lead that is 1/4 inch in diameter, wood that is 3/4 inch in diameter, an overall length of 6 inches, and a large eraser on one end. Another pencil may have different specifications.

Dimension specifications could also be used for purchasing a welding machine. The specifications should include such items as size, category type, range of brands, and portability.

An order for a typewriter or calculator might specify range of brands, keyboard size, memory and function capability, and power requirements (AC or battery).
Combination of Performance and Dimension Specifications

The majority of specification sheets are a combination of performance and dimension specifications. Most of the time the items to be purchased must meet certain performance standards as well as dimension requirements.

A good example of a combination specification is one written for a computer system. If the application programs must accomplish a specific task in a specific way, that information might be written as a performance specification. If specific hardware is desired such as memory and disk storage, that information might be written as a dimension specification.

Another example is a telephone system where performance specifications would be used to describe the required functions and dimension specifications would be used to define the hardware equipment.

In these cases, the specifications writer would describe the entire system, using both performance and dimension specifications and then use the specifications to analyze the vendor's response.

A Written Specification Example

The following example shows a breakdown for writing a specification for purchasing a computer system.

Software

The following questions might be asked when compiling specifications for computer system software:
1. How many offices are included? Which offices are included?
2. What tasks will the computer be expected to perform in each office?
3. What are the product requirements needed to accomplish these tasks?
4. What are the specific elements involved in accomplishing these tasks?
5. Where is the information for these tasks obtained?

The specification writer must analyze all of the needs and furnish all of the software requirements for each office in complete detail.

A vendor needs all these details to understand the total job the computer system has to handle. This analytic process should result in performance specifications for the application software, and may even result in decisions to exclude certain offices and tasks within some offices.

Compiling this information can also help officers and department heads know exactly what they need to do in preparation for receiving new computer systems.

**Hardware**

Usually dimension specifications are written to describe hardware items - by someone very knowledgeable about computer hardware. The dimensions might include information about the following items:
- Memory capacity
- Expansion capability
- Disk storage size and growth potential
- Number and types of terminals
- Terminal locations
- Number and speed of printers
- Printer locations

Along with the specifications obtained from these approaches, information, including that concerning the following items, is necessary to explain the expectations of the county to possible bidders:

- Warranties
- Maintenance service
- Training requirements
- Upgrades required by statutory changes
- Upgrades of software developed by the vendor

Always include information concerning penalties for failing to meet specifications agreed upon.

All of this information combined would constitute the overall specifications for the entire system and would require many pages of written information. These pages would then be attached to SA&I Form 4040, Invitation to Bid, which has the noncollusion affidavit on the back side.

The method described above can be used to determine specifications for any job or any item.
Chapter Eight
Analyzing to Determine Lowest and Best Bids

Oklahoma law requires that the "lowest and best" bids be selected for county purchases. However, determining which bid is the "lowest and best" is often difficult, and bidders sometimes question the selection of one vendor over another.

19 O.S. 2007, § 1505(B)(4)
61 O.S. § 117
Following a reliable, consistent system or procedure when determining the “lowest and best” bid can help make this process easier and more equitable. Each step in the process should be recorded in case the final decision needs to be justified.

When writing bid specifications, the writer should describe a response format and require that all bids adhere to that format. This action helps to make analyzing and evaluating bids easier.

If bidders include extraneous materials only remotely related to the bid specifications, a reasonable evaluation can be almost impossible to make. All bids must be thoroughly read before an accurate analysis can be made.

In summary, a procedure to analyze bids for “lowest and best” should have the following characteristics:

- Be a written procedure
- Be a systematic procedure
- Be capable of being defended and justified
- Lend itself to explanation
- Prescribe a specific bid response format
- Aid in analysis and evaluation of the bids
- Eliminate extraneous material

Another important point is that those persons analyzing bids should be completely familiar with the bid specifications. They need to know exactly what the product or service is required to do. Visiting personally with the requesting officer or the individuals who are requesting the purchase can help to determine product needs more completely.
**Analysis Procedures**

When the contents of all of the bids are placed in the same logical order, comparisons become simpler, and similar items can be compared more easily. Proper comparison requires a visual organization of the data.

When itemizing needs, the analyzer should use descriptive, specific detail and identify the most important qualities and characteristics.

The following system is widely used in industry and can provide a county with a written, systematic approach to reaching a "lowest and best" decision. The following procedure helps the writer to visually organize the data. Any format can be used, but a table similar to the one shown in Figures 8.1 through 8.9 is suggested.

To demonstrate the table and the procedure, this example uses imaginary bids received for a pickup truck with relatively unsophisticated specifications. Imaginary bids are received from three companies, called ABC, DEF and GHI.

The procedure contains the following steps:

1. List all the criteria that the product is expected to meet, all of which are included in the specifications, down the left side of the form, shown in Figure 8.1, in the “ATTRIBUTES” column.

   For brevity, the example in Figure 8.1 lists only four criteria: price, engine, wheel base, and cab.

   In cases where attributes are complex, it may be necessary to list sub-attributes under a main one to help remind the writer of all the important elements with which the bid should comply.

   For this example, the analysis form shows only sub-attributes for an engine.
### Table 8-1. Analysis Procedure: Listing Attributes

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>WT</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td></td>
</tr>
<tr>
<td>ENGINE</td>
<td></td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td></td>
</tr>
<tr>
<td>CAB</td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td></td>
</tr>
</tbody>
</table>
2. Under the column "WT" as shown in Figure 8-2, enter the weighted value of each particular attribute if it were to meet the bid specifications perfectly. This value will normally vary depending on the importance the analyzer places on this attribute toward meeting the needs of the requisitioning office.

Price is usually high in importance, so the weight given is 10 in the sample as shown in Table 8-2. The engine specifications may not be quite as important, so a weight of 9 is given. The wheel base is of even less importance, so a weight of 7 is assigned. The cab design may be a little more important than the wheel base because more than 3 people may need to ride at one time, so a weight of 8 is assigned.

The sub-attributes will be used later in the analysis.

Table 8-2. Analysis Procedure: Awarding Weighted Values

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>WT</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
</tr>
<tr>
<td>TOTALS</td>
<td>34</td>
</tr>
</tbody>
</table>
3. Under "**Company**," list the companies offering bids as shown in Table 8-3.

**Table 8-3. Analysis Procedure:**
Listing Companies Offering Bids

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
<th>WT</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
</tr>
</tbody>
</table>
4. Award a weighted value for the price stated in each bid as shown in Table 8-4.

The bids in the example stated the following information:

- ABC offered a diesel engine of 180 HP, long wheel base, and 3-passenger cab for a price of $12,500.00
- DEF offered a gasoline engine of 200 HP, short wheel base, and 5-passenger cab for $11,000.00
- GHI offered a gasoline engine of 220 HP, long wheel base and 6-passenger cab for $12,750.00.

Analysis of Price: ABC is awarded an 8; DEF is awarded a 10; and GHI is awarded an 8.5 weighted value.

Table 8-4. Analysis Procedure: Analyzing Price

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>WT</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>8.5</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td>34</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. Use the sub-attributes to analyze the engine as shown in Table 8-5.

First, analyze the horsepower sub-attribute:

- ABC is awarded a (-) because the HP is the lowest
- DEF is left blank
- GHI is awarded a (+)

Second, analyze the fuel sub-attribute:

The diesel engine is preferred, therefore ABC is awarded a + and the other two are left blank.

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>Company</th>
<th>WT</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td></td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>8.5</td>
</tr>
<tr>
<td>ENGINE</td>
<td></td>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
<td></td>
<td>-</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
<td></td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td></td>
<td>7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAB</td>
<td></td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td></td>
<td>34</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Third, analyze the engine.

Considering the +'s and -'s, GHI is awarded a 9. ABC and DEF are each awarded an 8 as shown in Table 8-6.

**Table 8-6. Analysis Procedure: Analyzing the Engine**

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>WT</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>8.5</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Horsepower</td>
<td>-</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td>34</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Analyze the wheel base.

ABC bid a long wheel base and is awarded a 7; DEF bid a short wheel base and is awarded a 5; and GHI bid a long wheel base and is awarded a 7 as shown in Table 8-7.

Table 8-7. Analysis Procedure: Analyzing the Wheel Base

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Horsepower</td>
<td>-</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td>34</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7. Analyze the cab.

ABC bid a three passenger and is awarded a 5; DEF bid a five passenger and is awarded a 7; and GHI bid a six passenger and is awarded an 8 as shown in Table 8-8.

Table 8-8. Analysis Procedure: Analyzing the Cab

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>10</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>ENGINE</td>
<td>9</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Fuel</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>CAB</td>
<td>8</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>TOTALS</td>
<td>34</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. Total each column.

The maximum points to be awarded under WT is 34. ABC receives 28, DEF receives 30 and GHI receives 32.5 as shown in Table 8-9.

9. From the totals, determine the "lowest and best" bid.

The “lowest and best” bid in this example is from GHI.
Table 8-9. Analysis Procedure: Totaling the Columns

<table>
<thead>
<tr>
<th>ATTRIBUTES</th>
<th>WT</th>
<th>ABC</th>
<th>DEF</th>
<th>GHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td></td>
<td>10</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>ENGINE</td>
<td></td>
<td>9</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Horsepower</td>
<td></td>
<td>-</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Fuel</td>
<td></td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WHEEL BASE</td>
<td></td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>CAB</td>
<td></td>
<td>8</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>TOTALS</td>
<td></td>
<td>34</td>
<td>28</td>
<td>30</td>
</tr>
</tbody>
</table>

The procedure described above can be used to analyze any bid, provided the attributes are easily recognized and distinguishable from carefully written specifications, and the vendors are required to follow a strict format in their response.

Keeping notes that briefly state why specific points are awarded and cross referencing them to the page and paragraph in the bid response helps justify the analysis at a later date. Attaching the notes to the bids when they are filed also provides a means of later justifying why a particular vendor received a bid.

Throughout this analysis procedure, do not hesitate to discuss the decision with the person(s) requesting the product or service. Ask them, “Is this what you wanted?”
Additional Considerations

When awarding contracts, a board should consider not simply the lowest bidder, but the lowest responsible bidder. If the award is made to a bidder other than the lowest bidder, a board must state the reasons for that action. A statement must be placed on file, be open to public inspection, and be a matter of public record.

The following is a suggested statement to use when the decision is made to contract with a bidder other than the lowest bidder.

On occasion, situations may arise which require the immediate delivery of products to the district. Taking into consideration the ability of the company to respond to the requirements of the contract in a timely manner, the bid of __________ does not appear to be the lowest responsible bid.

In considering the whether the lowest bidder is responsible, a board could consider the following factors:

- The ability, capacity, and skill of the bidder to perform the requirements of the contract
- The character, integrity, reputation, experience, and effectiveness of the bidder
- The quality of the bidder’s performance on previous contracts
- The bidder’s previous and existing compliance with state laws and city ordinances
- The sufficiency of the bidders financial resources and ability to perform the work financially
Chapter Nine
Vendor Lists

The County Purchasing Agent’s major function is to do the shopping for the county. To be an efficient shopper, the Purchasing Agent should know as much as possible about potential vendors including the following characteristics:

Dianna Cope, Muskogee Purchasing Agent and Second Deputy County Clerk, reviews vendor’s lists for a purchasing order.
This chapter offers some hints on developing a good vendor resource file by suggesting ways to locate vendors, obtain product information such as price and quality, and maintain the file as a future reference source.

**Locating Suppliers**

The following sources of goods and services are covered in this chapter:

- Customer suggestions
- Telephone directory yellow pages
- Suppliers indexes or registers
- Trade magazines
- Trade or industry associations
- Catalogs and sales brochures
- State Purchasing Division, Department of Central Services
- Letters of interest
- Oklahoma Directory of Manufacturers and Products
- Technology Centers (Small Business)
- The Internet
Customer Suggestions

The Purchasing Agents’ customers are the people in the county for whom they are purchasing goods and services. Suggestions from these customers can be an easy and reliable source of vendor information. Customers, more than anyone else, know what their needs are. In most cases, they already know where the needed goods can be obtained. They also know about special needs regarding ready access to the goods or delivery requirements.

Often, they have already done some initial shopping to identify the desired item(s). Customer suggestions are also a valuable source of information about unacceptable goods, services, or vendors.

Telephone Directory Yellow Pages

The yellow pages from a telephone directory provide an excellent single source for locating local or even state vendors. Request out-of-town directories from telephone companies that would be helpful for locating vendors and items. The following are some typical directories that the Purchasing Agent might find useful.

- Oklahoma City
- Tulsa
- Major towns in the county
- Other larger cities in the region

These telephone directories are indexed by product line, and give both addresses and telephone numbers.
Telephone directories can be used to begin a vendors' list. Using them, the Purchasing Agent can mail out a form letter to potential suppliers, and inquire about the availability of items that are not carried locally. This procedure can quickly eliminate those vendors who cannot provide the needed goods or services.

**Suppliers Indexes or Registers**

The following commercially available product indexes may prove useful in locating supply sources for hard-to-find items:

- MacRae's Blue Book - MacRae's Blue Book Company
  [http://www.macraesbluebook.com](http://www.macraesbluebook.com)


- Thomas Register of American Manufacturers
  Thomas Publishing Company, Inc.
  [http://www.thomasnet.com](http://www.thomasnet.com)

**Trade Magazines**

Virtually every significant professional, business, or industrial activity has a trade magazine or journal, although these are seldom available at public magazine stands. These magazines contain a wealth of information for both Purchasing Agents and their county customers.
Typically these magazines feature articles about the line of work involved such as experiences with the use of new products, successful new operating procedures, how-to-do-it stories, and reviews of new equipment. These articles can make the Purchasing Agent and other county employees more aware of new products or services coming onto the market. In addition the magazines contain a large number of product and service advertisements.

More detailed information can be obtained in one of the following three ways, depending on how urgently the goods or services are needed:

- By telephone
- By letter
- By product card

More details on each of these methods are outlined below.

**Telephone**

A call to the vendor can help determine what information is needed. Almost all ads give a telephone number, often a toll-free "800" number, and most firms will be glad to mail any desired specifications or information that are requested. Usually a salesman from a state or regional sales office can call on the county to provide prices and operating details, and give product demonstrations.
Letter

A letter, perhaps a form letter, can be sent to the advertised address requesting information, names and addresses of local vendors, prices, and delivery schedules. Generally, the letter results in a follow-up telephone call from a local or regional sales office offering additional information and assistance.

Product Card

Most trade magazines have one or two product cards inside to make obtaining information from several suppliers easier. These prepaid postcards, addressed to the magazine, have a series of numbers that correspond to numbered ads. Potential customers can circle those numbers that correspond to the product ads of interest, fill in their name and address, and mail the card.

Filling out a product card will accomplish two things. First the customer will receive a basic information packet from each supplier with some sales brochures or catalogs. Second, the customer's name is usually added to the magazine's mailing list. One word of caution: information requested in this manner often takes four to six weeks before delivery.

Often, trade magazines are sent free of charge to anyone who requests them. The cost of publication and distribution is covered by the advertisements. Publishers are usually anxious to add potential customers as new subscribers, so Purchasing Agents should not hesitate to request that their names be added.
If a trade magazine that advertises the types of products needed isn't easily obtainable, the Purchasing Agent can send a letter to the magazine on county stationery stating that they are the county Purchasing Agent and want to be added to the magazine's mailing list. This is usually sufficient.

Since trade magazines are usually sent to people in a specific line of business, finding out what is available is sometimes difficult. The Purchasing Agent might ask current vendors to suggest trade magazines that are appropriate for county business. A few that may prove helpful are listed below:

- Rural and Urban Roads
  380 N.W. Highway
  Des Plaines, IL 60016

- Better Roads
  Reader Service Dept.
  2720 South River Road, Number 126
  Des Plaines, IL 60018
  http://www.betterroads.com

The following group is one source for finding the names of other trade magazines:

- Industrial Marketing
  http://www.industrialmarketinginc.com
Trade or Industry Associations

Trade or industry associations are professional organizations supported primarily by manufacturers, suppliers, or contractors that sell these products and/or services. Often these associations provide technical assistance with product specifications, and make recommendations on product application.

These associations can be a valuable resource for determining sources of supply because they generally provide objective recommendations within the product lines they represent. Many associations publish their own magazines, technical bulletins, and handbooks. Some that might be helpful for the county are listed below:

- National Association of Purchasing Agents
  11 Park Place
  New York, NY 10007

- National Institute of Governmental Purchasing
  151 Spring Street
  Herndon, VA 20170-5223
  800-367-6447
  http://www.nigp.org

- National Lime Association
  200 North Glebe Road, Suite 800
  Arlington, VA 22203
  703-243-5463
  http://www.lime.org

- National Lumber Manufacturers Association
  1319 18th Street, N.W.
  Washington D.C. 20006
- Portland Cement Association
  5420 Old Orchard Road
  Skokie, IL 60677
  847-966-6200
  http://www.cement.org

- Highway and Transportation Officials
  444 North Capitol Street NW, Suite 249
  Washington, DC 20001
  202-624-5800
  http://www.transportation.org

- American Concrete Institute
  38800 Country Club Drive
  Farmington Hills, MI 48331
  248-848-3700
  http://www.concrete.org/general/home.asp

- Asphalt Institute
  2696 Research Park Drive
  Lexington, KY 40511
  859-288-4960
  http://www.asphaltinstitute.org

- Concrete Reinforcing Steel Institute
  933 North Grove Road
  Schaumburg, IL 60173-4758
  800-328-6306
  http://www.crsi.org
Catalogs and Sales Brochures

Catalogs
Catalogs can be very helpful when locating items not routinely purchased. Major product distributors or manufacturers publish most of them. Generally, catalogs include a list of all (or almost all) of the products carried, a short description of each, plus identifying numbers. Usually a price list, which is subject to frequent change, is supplied separately.

Although most individual catalogs will cover only a relatively narrow range of products, a new Purchasing Agent should assemble a collection of catalogs covering most of the items likely to be purchased, ranging from office supplies to road construction equipment.

The Purchasing Agent should also obtain references from county officers, vendors, the State Purchasing Division in the Department of Central Services, trade magazines and trade associations.

Sales Brochures
Sales brochures can be accumulated from suppliers and other sources. Some of these brochures will be single pages, while others will be similar to a specialized catalog. These brochures can be a valuable purchasing tool. The Purchasing Agent might find it useful to set up such a sales brochure file, indexed by product type, such as the following categories:
- Miscellaneous
- Office Equipment
- Office Furniture
- Printing and Printed Materials
- Road/Bridge Equipment Road Materials
- Trucks/Pickup/Vehicle parts and Supplies

**State Purchasing Division, Department of Central Services**

The State Purchasing Division, Department of Central Services can be extremely helpful in locating sources of supply. This office has the names and addresses of suppliers and vendors on a state and regional basis.

The list of winning vendors for state contracts is also a very valuable resource. Contact the Director of the Oklahoma Department of Central Services for information.

Oklahoma State Central Purchasing is online and has a variety of state contracts to view or download. The website address is http://www.ok.gov/DCS.

**Letters of Interest**

Under the present law, suppliers or vendors may submit a letter of interest requesting that they be notified of any county requests for bids. To insure that they are only sent request for bids on those items for which they wish to bid, vendors should indicate the goods or services on which they wish to bid when they submit a letter of interest.
Any vendor who does not respond to a request for bids for three consecutive bid lettings may be removed from the list of interested vendors.

The Purchasing Agent should solicit all potential vendors to assure that a complete list of interested vendors is maintained. Vendors or suppliers should be cross-indexed by product category.

**Oklahoma Directory of Manufacturers and Products**

The Oklahoma Industrial Development Department annually publishes a directory of manufacturers and products in Oklahoma. This directory can be a useful reference in locating suppliers and vendors within our state. A directory may be obtained (price $20.00) by contacting the following office:

Oklahoma Industrial Development Department  
500 Will Rogers Memorial Office Building  
Oklahoma City, OK 73105

**Technology Centers (Small Business)**

If a technology center exists within the county, it could be a source for local businesses. It could also be a source for student labor.

A technology center representative might assist with a bid package by notifying their list of contacts.
The internet can be a useful tool in obtaining price quotes or specifications or for purchasing the item requested. Some websites will process an order using a purchase order, but usually they will wait for a warrant to clear the bank before shipping items.

If local vendors have a website, visiting that website can save time over calling the vendor when obtaining a price quote. Computer equipment, software and other similar items are easily found on the internet.

Before actually purchasing items on the internet, it might be wise to contact the vendor after finding the needed items since not all websites are updated daily. The vendor might also be running a special that is not shown on the website. Sometimes the price quoted during a call is cheaper than the price on the website. This is especially true for computer equipment and supplies.

Search engines are one way to locate companies on the internet. Typing in keywords about products and vendors can generate several websites to investigate. Using bookmarks is a convenient way to keep a prospective vendor’s website on file and visit it easily.

Using email is also a convenient way to communicate with vendors.

Establishing a Listing by Product and Vendor

An accurate, up-to-date vendor index file speeds making telephone calls, aids in mailing notices, and generally helps in locating sources of supply. A simple card file, with vendor cards that are filed alphabetically, is recommended.
Vendor Cards

The following are recommendations for making vendor cards.

**Primary information to be included on vendor cards**

- Company name
- Telephone number
- Address

**Optional Information to be included on vendor cards**

- Name(s) of the sales contact
- Local offices (telephone number and address)
- General line of products or service
- Special information such as "preferred vendor by Treasurer"

An example index vendor card is shown in Figure 9-1.
To be really useful, the vendor's index should be cross-filed with a product index. A cross-referenced product index will be very important for new Purchasing Agents or for use in finding items that are seldom purchased.

The product index should be as detailed as necessary to be helpful. It might start with broad categories and be broken down into more detailed levels based on the Purchasing Agent's experience.

If the categories are too broad, several cards may be required to list all the vendors. If the categories are too narrow, the index will contain an excessive number of essentially duplicate cards.

A sample product index card is shown in Figure 9-2.
These product index cards can be used as an initial reference in obtaining telephone quotes or mailing bid notices.

**Maintaining Current or Best Prices**

To help maintain current or best prices, the Purchasing Agent may establish an index to track current prices on some selected items such as those listed below:

- Culverts/Culvert pipe
- Emulsions
- Tires or tire repair
- Crushed rock
- Drugs
- Special printing
- Selected office supplies
Product Price Index Cards

A suggested product price index card, which should be filed alphabetically, is illustrated in Figure 9-3.

<table>
<thead>
<tr>
<th>Product: Gloves</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor No.</td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Purchase Order or Inquiry No.</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Freight Classification</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Commodity Name</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Figure 9-3. Sample Product Price Index Card
The suggested example above shows a 5-by 8-inch index card, which should be filed numerically by part or drawing number, or alphabetically by part name.

The information included is listed below:

- Previous sources or potential sources
- Locations
Chapter Ten

Inventories of County Property

The State Auditor and Inspector (SA&I) has determined that the statutory and accounting requirements for county inventories can be met by maintaining two separate inventories:
1. A fixed assets inventory
   
   Fixed assets include equipment and land (real property) and buildings.
   
   The County Clerk maintains the fixed asset master inventory for the county.
   
   Each county office, department, or other entity must maintain a subsidiary set of inventory records for fixed assets assigned to them.
   
   Budget Board counties may appoint a road and bridge inventory officer, instead of the County Clerk, to maintain records for road and bridge fixed assets.
   
   Since Budget Board counties are required to follow generally accepted accounting principles, they must also maintain an inventory of land and buildings. Land and buildings should be recorded at their initial (historical) cost.

2. A consumables inventory
   
   Consumables are items that are used up such as office supplies and gravel. They are divided into two categories:
   
   1. Road and bridge items
   2. [ Other than road and bridge items ]

   Each county office, department, or other entity [ must ] maintain a set of inventory records for the consumables that they use.

**Inventory Uniform Identification Systems**

The SA&I and each county’s Board of County Commissioners are directed by law to prescribe uniform identification systems for specified inventories, as indicated below:
The State Auditor and Inspector

❖ Prescribe an identification system and set of inventory procedures for all equipment that originally costs [$500.00] or more, and that is used to construct and maintain roads and bridges.

**NOTE:**

Title 19 O.S § 1505.G refers to the procedure upon consumption or disposal or supplies, materials, or equipment. That amount remains at $250.00.

❖ Prescribe an identification system and set of inventory procedures for all supplies and materials that cost $500.00 or more, are purchased in lots, and are used to construct and maintain roads and bridges.

The Board of County Commissioners

❖ Create and administer an inventory system for all equipment of a county having an original cost of [$500.00] or more that is not used in the construction and maintenance of roads and bridges.

❖ Create and administer an inventory system for all supplies and materials purchased in lots of $500.00 or more and that are not used in the construction and maintenance of roads and bridges.

The Board of County Commissioners may designate an employee in their office to administer the inventory systems.


**County Inventory of Fixed Assets**

The inventory officer in each office, department, or other entity and the County Clerk must maintain a record of tools, apparatus, machinery, and equipment, [except that which is affixed to and made a part of lands and buildings]. A separate form must be prepared for each single item with an initial value of [$500.00] or more, whether owned, borrowed, leased, or obtained in any other way that places the item under the control of the office, department, or other entity.

A copy of the form used must be forwarded to the County Clerk for each receipt or disposal of an item with an initial value of [$500.00] or more.

When maintaining county inventories of fixed assets, the officers listed below have the responsibilities indicated:

### The Receiving Officer

- Identify any items with an initial value of [$500.00] or more
  
  **NOTE:** Some items with an initial cost of less than [$500.00], but that are easily stolen and relatively expensive (such as calculators, adding machines, and typewriters) might also be included in this running inventory.

- Determine the identification number from the identification system prescribed by the SA&I.

  Refer to the “Identification of Capital Assets” [equipment purchased out of capital outlay] in this chapter.

- Mark each item with its proper identification number.
Prepare two copies of SA&I Form No. 9005, *Fixed Asset Record – Property and Equipment*, or SA&I Form No. 3511, *Record of Tools, Apparatus, Machinery and Equipment*.

The *Fixed Asset Record – Property and Equipment* form is used to maintain a record of fixed assets such as automobiles, office furniture and equipment, road machinery and equipment, radios, and other items.

Both of these forms have two parts.

- **Schedule A** on the *Record of Tools, Apparatus, Machinery and Equipment* form (“Record of Items Acquired”) and the top half of the *Fixed Asset Record – Property and Equipment* form (“Record of Acquisition”) are used for items as they are acquired.

- **Schedule B** on the *Record of Tools, Apparatus, Machinery and Equipment* form (“Record of Items Disposed Of”) and the bottom half of the *Fixed Asset Record – Property and Equipment* form (“Record of Deposition”) are used to record the disposition of items in the inventory.

Forward one copy of whichever form is used to the inventory officer in their office and one to the County Clerk.
File one copy of the SA&I Form No. 9005, *Fixed Asset Record – Property and Equipment*, or SA&I Form No. 3511, *Record of Tools, Apparatus, Machinery and Equipment* form in the fixed asset subsidiary inventory for their office or department.

Maintain SA&I Form No. 3512, *Summary Report*.

The inventory officer of each department or office should prepare the Summary Report biannually (twice a year) and forward it to the County Clerk.

Information for this report should be gathered through a physical inventory of all property under the control of the office or department and cross checked with the *Fixed Asset Record – Property and Equipment* or the *Record of Tools, Apparatus, Machinery and Equipment*.

The inventory officer should perform a physical inventory and cross check a minimum of once each year.

A physical inventory should be taken whenever there is a change in office or department heads for whatever reason.
The County Clerk

- File the copy of the SA&I Form No. 1-9005, *Fixed Asset Record – Property and Equipment*, or SA&I Form No. 3511, *Record of Tools, Apparatus, Machinery and Equipment* in the fixed asset master inventory for the county.

**NOTE:**

Fixed asset inventory files for the county should be arranged by separate offices or departments so that master records may be verified with subsidiary files.

Transfer of Inventory between Offices, Districts, or Projects

- To transfer materials, supplies, equipment, and machinery between officers, districts, or projects, SA&I Form No. 9001, *Transfer Document*, must be completed.

  Copies of this form are distributed in the following manner:

  - One copy to the department to which the inventory is being transferred
  - One copy to the inventory officer of the department receiving the inventory
  - One copy to the department transferring the inventory
The County Clerk must be notified if the transfer involves equipment or machinery. The bottom half of SA&I Form No. 9005, *Fixed Asset Record – Property and Equipment* (“Record of Deposition”), or Section B of SA&I Form No. 3511, *Record of Tools, Apparatus, Machinery and Equipment* (“Record of Items Disposed Of”) for that item must be completed.

### Consumable Goods Inventory (Road and Bridge Items)

**The Receiving Officer**

- Identify all road and bridge items purchased in lots costing $500.00 or more.  
  19 O.S. 2007, § 1505(G)(1-2)

- Either prepare a new SA&I Form No. 9002, *Project Inventory Record*, for those items purchased that have not previously been carried on the inventory. or add the quantity received to the existing *Project Inventory Record* for items currently on inventory records.  
  19 O.S. 2007, § 1502

All consumables used in completing road and bridge numbered projects are reported on the *Project Inventory Record* form. The form is completed by the inventory officer assigned to the office or department submitting the report, [ then kept on file by the consuming department. ]  
  19 O.S. 2007, § 1505(G)

- Continue to enter adjustments on the *Project Inventory Record* as items are used and others received.
Prepare, on a monthly basis, SA&I Form No. 1-9003, Summary Report of consumable Items.

The Summary Report of Consumable Items form is used in preparing the monthly summary report of consumables used in maintaining county roads and bridges [plus the bi-monthly summary report of consumables other than road and bridge items] used by the county.

This form is prepared by the inventory officer in each office or department. Information for the report is obtained from the Consumable Stock Record.

Monthly reports of consumables used in maintaining roads and bridges are filed in the office of the Board of County Commissioners for review by the Road and Bridge Inventory Officer.

Forward the completed form to the County Clerk.

When a project is complete, the Receiving Officer completes the following tasks:

- Transfer out any unused materials or supplies to another project or to the warehouse.
- Attach a completed copy of the Project Inventory Record, to the monthly Summary Report of Consumable Items.
Weekly Warehouse Summary

Each week, the Receiving Officer completes SA&I Form No. 9006, *Weekly Warehouse Summary*, and sends it to the Road and Bridge Inventory Officer who files the form in the warehouse.

The Board of County Commissioners

- Review all *Summary Report of Consumable Items* report forms filed with the Board of County Commissioners, [which are kept on file in each commissioner’s district.]

[19 O.S. 2007, §§ 1502 and 1505]

Transfer of Inventory Between Offices, Districts, or Projects

- [To transfer materials, supplies, equipment, and machinery between officers, districts, or projects, SA&I Form No. 9001, *Transfer Document*, must be completed.]

[19 O.S. 2007, §§ 1502 and 1505]

[Copies of this form are distributed in the following manner:

  - One copy to the department to which the inventory is being transferred
  - One copy to the inventory officer of the department receiving the inventory
  - One copy to the department transferring the inventory]
The Inventory Officer indicates any transfers on SA&I Form No. 9006, *Weekly Warehouse Summary*, each week. Transfers are also indicated on SA&I Form No. 9002, *Project Inventory Record*, which is filed at the end of a project.

**Identification of Capital Asset Items**

The SA&I has developed a systematic method of identifying each capital asset item using a code number. This simple code number uses a letter to designate the office responsible for an item and a number to indicate a specific item.

For example, a code number of D-201 would indicate that the item belongs to the office of the County Commissioner (the D) and is a typewriter (the number 201). The following letters would indicate the various county offices and departments.

- **A** District Attorney
- **B** County Sheriff
- **C** County Treasurer
- **D** County Commissioners
- **E** Agriculture (County Agent)
- **[EM]** Emergency Management
- **F** County Clerk
- **[FD]** Fire Department
- **G** County Superintendent
- **H** County Assessor
- **I** County Surveyor
NOTE:

All items under the direct control of the County Commissioners have a code number beginning D. A three-digit number identifies the class of equipment. The six major classes of equipment are identified as follows:
<table>
<thead>
<tr>
<th>Code Number Range</th>
<th>Equipment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-199</td>
<td>Office Furniture</td>
</tr>
<tr>
<td>200-299</td>
<td>Office Machines and Equipment</td>
</tr>
<tr>
<td>300-399</td>
<td>Road Machinery and Equipment</td>
</tr>
<tr>
<td>400-499</td>
<td>Equipment for Maintenance and Repair</td>
</tr>
<tr>
<td>500-599</td>
<td>Health Apparatus and Equipment</td>
</tr>
<tr>
<td>600-699</td>
<td>Miscellaneous Apparatus, Machinery and Equipment</td>
</tr>
</tbody>
</table>

The code numbers in each of the six groups are sub-classified to allow a better description of items as shown in the following breakdown:
<table>
<thead>
<tr>
<th>Code Range</th>
<th>Equipment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>100-199</td>
<td><strong>Office Furniture</strong></td>
</tr>
<tr>
<td>101</td>
<td>Safes and Chests</td>
</tr>
<tr>
<td>102</td>
<td>Chairs</td>
</tr>
<tr>
<td>103</td>
<td>Stools</td>
</tr>
<tr>
<td>104</td>
<td>Filing Cabinets</td>
</tr>
<tr>
<td>105</td>
<td>Desks</td>
</tr>
<tr>
<td>106</td>
<td>Bookcases</td>
</tr>
<tr>
<td>107</td>
<td>Tabulating Card Files</td>
</tr>
<tr>
<td>108</td>
<td>Visible Record Files</td>
</tr>
<tr>
<td>109</td>
<td>Storage Cabinets</td>
</tr>
<tr>
<td>110</td>
<td>Tables</td>
</tr>
<tr>
<td>111 to 199</td>
<td>Office Furniture not Classified</td>
</tr>
<tr>
<td><strong>200-299</strong></td>
<td><strong>Office Machines and Equipment</strong></td>
</tr>
<tr>
<td>201</td>
<td>Typewriters</td>
</tr>
<tr>
<td>202</td>
<td>Adding Machines</td>
</tr>
<tr>
<td>203</td>
<td>Calculators</td>
</tr>
<tr>
<td>204</td>
<td>Electric Fans</td>
</tr>
<tr>
<td>205</td>
<td>Photographic Recording Machines</td>
</tr>
<tr>
<td>206</td>
<td>Photo-Print Washers</td>
</tr>
<tr>
<td>207</td>
<td>Photo-Print Dryers</td>
</tr>
<tr>
<td>208</td>
<td>Air Conditioners (Water)</td>
</tr>
<tr>
<td>209</td>
<td>Air Conditioners (Refrigerated)</td>
</tr>
<tr>
<td>210</td>
<td>Water Coolers</td>
</tr>
</tbody>
</table>
211  Dictating Machines
212  Transcribing Machines
213  Duplicating Machines
214  Time Stamping Machines
215  Envelope Sealing Machines
216  Addressing and Mailing Machines
217  Microfilm Machines
218 to 220  Computers, Land Processor Equipment
221 to 299  Office Machines and Equipment
                        not Otherwise Classified.

300-399  Equipment and Machinery
300  Salvaged Equipment
301  Pickup Trucks
302  Trucks (other than pickups) (describe type of bed); (includes busses)
303  Tractors (track type)
304  Tractors (wheel type)
305  Graders (power operated)
306  Graders (hand operated)
307  Motor patrols - Motor Graders
308  Shovels
309  Rock Crushers
310  Cement Mixers, Bondact Guns
311  Power Drills
312  Power Loaders
313  Draglines
314  Clamshells
315  Cranes
316  Scrapers, Drags, Fresnos, Team Graders, Tractor Drawn Graders
317  Crawler Wagons
318  Plows
319  Rippers, Rooter Grader
320  Rollers
321  Snow Plows
322  Power Hammers, Hyd ras, Jack Hammers, Paving Breakers, Tamper Pneumatic Impactor, Backhoe Attachments, Breaker Drills, Chip Hammers, Pikedrive Hammers
323  Bulldozers
324  Air Compressors - Portable
325  Spreaders, Tail Gate, Chip Spreader, Mulch
326  Discs, Road
327  Ditching Machines
328  Stationary Engines
<table>
<thead>
<tr>
<th>Inventory Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>329</td>
<td>Electric Motors</td>
</tr>
<tr>
<td>330</td>
<td>Power Saws, Concrete, Chain</td>
</tr>
<tr>
<td>331</td>
<td>Automobiles</td>
</tr>
<tr>
<td>332</td>
<td>Backhoes, Loaders, Tractor Units,</td>
</tr>
<tr>
<td></td>
<td>Backhoe Tractor Mounted</td>
</tr>
<tr>
<td>333</td>
<td>Conveyors</td>
</tr>
<tr>
<td>334</td>
<td>Harrows</td>
</tr>
<tr>
<td>335</td>
<td>Graders - Elevating</td>
</tr>
<tr>
<td>336</td>
<td>Road Runners</td>
</tr>
<tr>
<td>337</td>
<td>Sweepers (towing, power, street)</td>
</tr>
<tr>
<td>338</td>
<td>Traffic Warning Systems, Lane Markers</td>
</tr>
<tr>
<td>339</td>
<td>Power Trowels, Vibrators</td>
</tr>
<tr>
<td>340</td>
<td>Pavers-Asphalt, Curb Pavers, Road Wideners</td>
</tr>
<tr>
<td>341</td>
<td>Derrick Units, Core Drills, Post Hole Diggers</td>
</tr>
<tr>
<td>342</td>
<td>Snoopers</td>
</tr>
<tr>
<td>343</td>
<td>Front End Loader Attachments</td>
</tr>
<tr>
<td>344</td>
<td>Seeders, Hydro Seeders</td>
</tr>
<tr>
<td>345</td>
<td>Front End Loaders, Fork Lifts</td>
</tr>
<tr>
<td>346</td>
<td>Pulvi Mixers</td>
</tr>
<tr>
<td>347</td>
<td>Station Wagons, Vans, Carryall/Suburbans, Crew Cabs</td>
</tr>
<tr>
<td>348</td>
<td>Trailers</td>
</tr>
<tr>
<td>349</td>
<td>Boats</td>
</tr>
<tr>
<td>350</td>
<td>Guardrail Straighteners</td>
</tr>
</tbody>
</table>
351  Traffic Line Marking Machines
352  Air Planes
353  Center Strip Paint Machines-Truck Mounted, Centerline Striping Machines
354  Dump Beds (not on a truck)
355  Survey Equipment
356  Excavating Graders (Gradall, Teleskoop, etc.)
357  Self Propelled Water Wagons
358 to 399  Road Machinery and Equipment not Otherwise Classified.

400-499  **Equipment for Machinery**
401  Electric Motors
402  Drills
403  Acetylene Welding Units
404  Electric Arc Welding Units
405  Stationary Engines
406  Air Compressors -Stationary
407  Hoists
408  Winches
409  Cranes
410  Jacks
411  Grease Guns, Grease Guns Truck Mounted
412  Fuel Pumps
413  Storage Tanks -Fuel Tanks
414  Fans and Blowers
415  Forges
416  Power Hammers
417  Generators
418  Converters
419  Transformers
<table>
<thead>
<tr>
<th>Code</th>
<th>Equipment Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>420</td>
<td>Pumps, Mud Jack, Water</td>
</tr>
<tr>
<td>421</td>
<td>Unassigned</td>
</tr>
<tr>
<td>422</td>
<td>Lathes</td>
</tr>
<tr>
<td>423</td>
<td>Power Presses</td>
</tr>
<tr>
<td>424</td>
<td>Power Planers</td>
</tr>
<tr>
<td>425</td>
<td>Power Saws, Concrete (Not Chain) Routing Machine</td>
</tr>
<tr>
<td>426</td>
<td>Valve Refacing Machines</td>
</tr>
<tr>
<td>427</td>
<td>Emery Grinders</td>
</tr>
<tr>
<td>428</td>
<td>Cylinder Reboring Machines</td>
</tr>
<tr>
<td>429</td>
<td>Riveting Machines</td>
</tr>
<tr>
<td>430</td>
<td>Lawn Mowers, Rotary- Manual, Self-propelled, Riding</td>
</tr>
<tr>
<td>431</td>
<td>Hedge Clippers</td>
</tr>
<tr>
<td>432</td>
<td>Asphalt Distributors, Asphalt Heaters</td>
</tr>
<tr>
<td>433</td>
<td>Asphalt Kettles</td>
</tr>
<tr>
<td>434</td>
<td>Curb Dressers</td>
</tr>
<tr>
<td>435</td>
<td>Oil Heaters (tank car)</td>
</tr>
<tr>
<td>436</td>
<td>Road Oil Mixers with Supply Tanks</td>
</tr>
<tr>
<td>437</td>
<td>Sand Dryers and Blasters</td>
</tr>
<tr>
<td>438</td>
<td>Weed Sprayers</td>
</tr>
<tr>
<td>439</td>
<td>Power Washers - Steam Cleaner</td>
</tr>
<tr>
<td>440</td>
<td>Rotary Tillers</td>
</tr>
<tr>
<td>441</td>
<td>Mowing Attachments (rotary attachments)</td>
</tr>
<tr>
<td>442</td>
<td>Paint Machines</td>
</tr>
<tr>
<td>443</td>
<td>Electronic Equipments</td>
</tr>
<tr>
<td></td>
<td>(assign radios if they call in for a number only)</td>
</tr>
<tr>
<td>444</td>
<td>Equipment and Machinery for Maintenance and Repairs not Otherwise Classified</td>
</tr>
</tbody>
</table>
Chapter Ten 10-20 Inventories of County Properties

500-599 Hospital or Public Health Apparatus and Equipment
501 Hospital Beds
502 Operating Tables
503 Sterilizers
504 X-Ray Machines
505 Fluoroscope Machines
506 Lockers
507 Scales
508 Chests
509 Examination Tables
510 Examination Chairs
511 Dental Chairs
512 to 599 Hospital or Public Health Apparatus and Equipment not Otherwise Classified

600-699 Miscellaneous Apparatus, Machinery and Equipment
601 Radio Broadcasting Equipment
602 Radio Receiving Equipment
603 Telephone Switchboards
604 Public Address Systems
605 Stoves
606 Firearms
607 Dishwashing Machines
608 Washing Machines (Clothes)
609 Tables (Other than Office)
610 to 699 Miscellaneous Apparatus Machinery and Equipment not Otherwise Classified – Live Inventory
The following examples illustrate this method of identification.

<table>
<thead>
<tr>
<th>Code Number</th>
<th>Description</th>
<th>Responsible Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>D-201</td>
<td>Typewriter</td>
<td>County Commissioner</td>
</tr>
<tr>
<td>D-102</td>
<td>Chair</td>
<td>County Commissioner</td>
</tr>
<tr>
<td>D-403</td>
<td>Oxy-acetylene Welder</td>
<td>County Commissioner</td>
</tr>
<tr>
<td>B-606</td>
<td>Firearm</td>
<td>Sheriff</td>
</tr>
<tr>
<td>E-203</td>
<td>Calculator</td>
<td>County Extension Director</td>
</tr>
</tbody>
</table>

NOTE:

Some numbers in each code number range will not be used. For example, in the office furniture range the numbers 111 to 199 are unused in the example.

Unused numbers may be assigned to some new equipment type not previously listed provided a list is maintained that shows what type of equipment is indicated by this new number. A computer purchased to maintain county records should have a 600 series number as it falls in the miscellaneous apparatus, machinery, and equipment group. Any unused number, say 610, could represent computers. The computer would be coded as D-610 and a note added to the master list to show that 610 indicates computers.
Finally, an addition to the code number could be used to identify separate items of the same type. For example, three chairs could be identified as D-102.1, D-102.2, and D-102.3.

The last number after the decimal point refers to a specific item and the same decimal number should not be used more than once.

Thus, after a long time, common items (like chairs) might be identified by a rather large number, for example, D-102.27. This number would indicate that the particular chair is the 27th one belonging to the County Commissioner's office.

**NOTE:**

In the county inventory system, the same identifying inventory number must never be used twice, even if an item no longer exists on the inventory. Once an item is disposed of, the number for that item is never used again.
Chapter Eleven
Disposing of Surplus Property

This chapter discusses the various methods of disposing of surplus property and the procedures for recording such dispositions.
NOTE: The Board of County Commissioners may not declare any property as surplus during the period beginning 30 days before the filing period for any election of a County Commissioner and ending the day after a County Commissioner is sworn in as a county officer.

19 O.S. 2007, § 421.2
19 O.S. § 333(B)

Declaration of Surplus

Every item of surplus property that is listed on the county’s inventory and has an original cost of more than $250 must be disposed of in a manner provided by law. The Board of County Commissioners must be notified in writing of any property that becomes surplus and is subject to disposal.

Before disposing of any surplus property, the Board of County Commissioners must declare the property as surplus by resolution and enter that declaration into the minutes of a board meeting.

Methods

The Board of County Commissioners has several methods by which they can dispose of surplus equipment. Each of these methods requires a resolution.

Through The Oklahoma Department of Transportation

The Board may, by resolution, dispose of Road and Bridge machinery and equipment by using the following procedures, although one of the other disposition methods listed in this “Methods” section may be used instead:

O.S. 69 § 636.6
The Board of County Commissioners

- Declare an item surplus.
- Establish a minimum acceptable price.
- Request the Oklahoma Department of Transportation (ODOT) to handle the disposition.

The County

- Prepare the equipment for sale.
- Deliver the item to the ODOT Division Headquarters where it is to be auctioned off.
  These public auctions are held yearly at various ODOT Division Headquarters around the state.

By Sealed Bid

Property may be disposed of by sealed bid by following the procedures listed below:

The Board of County Commissioners

- Declare an item surplus.
- Advertise the sealed bid sale in a newspaper of general circulation for two successive weekly issues.
The County Clerk

- Follow the normal bidding procedures in advertising, accepting, and opening bids.

The Board of County Commissioners

- Open the bids at the next regular meeting after at least 15 days have expired since the first publication of the sale notice.
- May either accept the highest and best bid or reject all bids

By Public Auction

Counties may hold a public auction or participate in a public auction to dispose of surplus equipment.

The Board of County Commissioners

- Declare an item surplus.
- Advertise the public auction in a newspaper of general circulation for two successive weekly issues.

NOTE:

The advertisement must be a legal notice as defined by the statutes. An advertisement by the auctioneer does not meet the requirements of a legal notice.

For auctions with other counties, each participating county runs its own separate legal notice.

19 O.S. 2007, § 421.1(C)
Purchasing Agents from Other Counties

- May attend and bid following procedures outlined in this handbook

Circuit Engineering Districts

- Advertisement of surplus property consigned to sell at a Circuit Engineering District auction must be provided by the auction company under contract to conduct the sale. Advertising must attempt to attract the most potential buyers. Advertising media may include, but not be limited to, sale flyers, newspapers, radio, television, and Internet postings.  

By Sale to State Agency or Political Subdivision of the State

Surplus tools, apparatus, machinery or equipment may be sold to a state agency or a political subdivision of the state after being declared surplus.  

To qualify, state agencies must be subject to the Oklahoma Central Purchasing Act, and political subdivisions must be subject to the same act or similar competitive bidding procedures.

By Junking

Property considered beyond economic repair and surplus to the needs of the county may be disposed of by junking.
By Trade-in

Tools, apparatus, machinery, or equipment belonging to the county, may be used as a trade-in on a cash purchase [ or lease purchase ] of any other tools, apparatus, machinery or equipment.

By Transfer to A Political Subdivision within The County

Any machinery, equipment, or vehicle that is deemed to be surplus by the Board of County Commissioners may be transferred to another political subdivision of the state located within the county.

The political subdivision from which the property is being transferred must be located within the district of one of the commissioners voting favorably for the transfer. When the political subdivision receiving the property declares it surplus to its needs, the property must be transferred back to the county for further disposition. [ Once the county receives the property back the board has two weeks to decide whether it wants the items. If the county does not want the property, the board can dispose of it. ]

Resolution of Disposition

Within 30 days after disposing of any surplus property, the Board of County Commissioners must complete SA&I Form No. 397, Resolution of Disposing of Equipment.

The disposition of all property on the Resolution of Disposing of Equipment must be entered into the minutes of the Board of County Commissioners within 30 days after the disposition. The minutes of the board must reflect the following information:
19 O.S. §421

The Board of County Commissioners may, by resolution, enter into an agreement with any other county or political entity for the purpose of selling, transferring, trading, or otherwise disposing of equipment or materials.
Appendix A
Using the Oklahoma Statutes

NOTE:
For any questions on how to interpret a statute or law, the County Clerk should request legal advice from the District Attorney’s office.

The Oklahoma Statutes On-line
The Oklahoma Statutes can be accessed on line through the Oklahoma Supreme Court Network (OSCN). The URL or web address is http://www.oscn.net. Once the site comes up, click on the part of the black bar at the top of the page that says “Legal Research.” Then click on “Oklahoma Statutes Citationized.” When the list of statute titles appears, click on “expand” at the right-hand side of the title listing. After the title sections appear, click on the section needed. These copies of the statutes have all of the information found in the statute books plus historical information and court case data. They are updated once each year in August.

The Oklahoma Statutes
The Oklahoma Statutes are made up of statutes, supplements, and session laws. All the laws enacted, amended, and repealed since statehood comprise a multi-volume set published every ten years. For example, the Oklahoma Statutes,
2001 contains all the laws passed from statehood up to and including the 2001 legislative session.

**The Supplements**

Each year, legislators publish a Supplement containing all the laws enacted, amended, or repealed since the *Oklahoma Statutes* were last published. Therefore, a full reading of the law would require the reader to consult the *Oklahoma Statutes* and the latest Supplement.

**Session Laws Citations**

Following each session of the state legislature, all laws enacted in that session are published as the Oklahoma Session Laws for that year.

In the interim between the time legislators pass the laws and the time they publish the Annual Supplement to the *Statutes*, the Oklahoma Session Laws are the only reference available for the new laws. In order to find a law, either the date of passage or the number of the Bill is needed, as the Session Laws index lists laws both chronologically and by number.

**Index**

The last volume of the *Oklahoma Statutes* has two parts. The first part is an alphabetical index of topics found in the previous volumes. The second part presents tables showing where the laws from former revisions and compilations appear in the most recent compilation.

**Alphabetical Index**

The index to the *Statutes* is organized by major topics. Following each major topic heading is an alphabetical list of subentries to the major topic. Each subentry may be further subdivided as well. Following each subentry is the Title and section where you can find it. For example, to find the laws addressing fees charged by Court Clerks, locate the major topic heading "Court Clerk" and search the alphabetical list under the heading for "Fees."
This particular example appears in the index in the following manner:

COURT CLERKS

Fees, 28§31, 151 et. seq.
Alimony without divorce, 28§152
Conveyances, 28§32
Divorce Actions, 28§152

Therefore, statutes addressing fees are in Title 28, Section 31 and Section 151 and the following sections (et. seq. means "and following").

Other notations following a concept listing are

- *generally, this index* means the subentry is a major topic
- elsewhere in the index
- *ante* means the concept is listed prior to that listing under the same topic heading
- *post* means the concept is listed after that concept listing under the same topic heading

**Tables**

The tables in the index help locate a statute only the session law date and number are known. For example, to find the location of the session law "laws 1970, C. 110§1" in the *Oklahoma Statutes, 1991*, locate the table for "laws 1970" under the major heading "session laws 1931-1991." The table reads as follows:

<table>
<thead>
<tr>
<th>Laws 1970</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>110</td>
</tr>
</tbody>
</table>
**A Closer Look**

Statutes, supplements, and session laws are made up of Titles, which are divided into chapters, which are divided into sections.

**Titles**

Each part of the *Oklahoma Statutes* is organized into major categories called Titles, which are arranged alphabetically by the title of the category. These are Titles. Each Title is numbered consecutively in both the Table of Contents and throughout the *Statutes*. The Titles listed in Volume I begin as follows:

<table>
<thead>
<tr>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Abstracting</td>
<td>187</td>
</tr>
<tr>
<td>2. Agriculture</td>
<td>192</td>
</tr>
<tr>
<td>3. Aircraft and Airports</td>
<td>412</td>
</tr>
</tbody>
</table>

Thus, a reference made to "Title 2 of the Statutes" is actually a reference to laws generally pertaining to agriculture.

**Chapters and Sections**

Each Title in the *Statutes* is organized by chapters which pertain to the major topic of the Title. Chapters are further divided into sections. Instead of starting over with one at every new chapter, sections are numbered continuously throughout each Title, so that only the Title and section number need be known. The chapter number is unnecessary.

At the beginning of each Title, a listing of the chapter headings and section numbers can be found. Thus, Title 19, Counties and County Officers, is subdivided in the following manner:
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Status and Powers of Counties</td>
<td>1</td>
</tr>
<tr>
<td>2. Creation and Alteration of Counties</td>
<td>11</td>
</tr>
<tr>
<td>3. Assets and Liabilities Among</td>
<td>61</td>
</tr>
<tr>
<td>Constitutional Counties</td>
<td></td>
</tr>
</tbody>
</table>

At the beginning of each chapter is a complete list of topics covered in that chapter and sections where topics are found. For example, Title 19, Chapter 1, begins as follows:

Chapter 1: Status and Powers of Counties

Section
1. Powers in General
2. Property of County
3. Powers of county exercised by Board of County Commissioners

The symbol designating a section in the *Statutes* is §. Therefore, Title 19, of the 2001 *Oklahoma Statutes*, section 116 is written 19 O.S. §116. *Statutes* from the 2001 volumes usually do not have a date indication. If the law has been changed or a new law has been passed, references from the Supplements are written 19 O.S. 2007, §116 to show that the law must be looked up in the 2007 *Supplement* for the latest version.

After each section of the *Statutes* will be a footnote listing the following information:
- The year in which the law enacted
- The year(s) in which amendments were made
- The date on which the law or amendment became effective if an emergency was declared
• The chapter (or page number) and the section of the Oklahoma Sessions
• The Laws at which the law or amendment is found
  For example, following 19 O.S. §165 is the footnote:
  Laws 1979, C. 221, §5, emerg. eff. May 30, 1979

Therefore the law relating to 19 O.S. §165 was enacted in 1979, is found at
Chapter 221, Section 5 of the Oklahoma Session Laws 1979, and became
effective May 30, 1979. The law was amended in 1980. The amendment can
be found at Chapter 302, Section 2 of the Oklahoma Session Laws 1980. The
amendment became effective July 1, 1980.
Appendix B
Related Sources, Addresses, and Phone Numbers

Association of County Commissioners of Oklahoma (ACCO)
429 N. E. 50th
Oklahoma City, Oklahoma 73105
    405-524-3200
    800-982-6212
Fax: 405-524-3700
http://www.okacco.com

Publications Available:
Employment Policies and Procedures Handbook for County Elected Officials
ACCO Fire and Safety Manual
Commission on County Government Personnel Education and Training
County Training Program
313 Ag Hall
Oklahoma State University
Stillwater, OK 74078-8088
   405-744-6555
Fax:  405-744-8210
ctp@okstate.edu
http://agecon.okstate.edu/ctp

**Publications Available:**
- Handbook for County Clerks of Oklahoma
- Handbook for County Court Clerks of Oklahoma
- Handbook for County Commissioners of Oklahoma
- County Equalization Board Handbook
- The Purchasing Handbook for Oklahoma Counties
- The Handbook for County Treasurers of Oklahoma
- The Handbook for the County Assessors of Oklahoma

Department of Central Services
Central Purchasing Division (State Purchasing Division)
Will Rogers Office Building (2401 North Lincoln), Suite 116
P.O. Box 528803
Oklahoma City, OK 73152-8803
   405-522-0955
Fax:  405-521-4475

http://www.ok.gov/DCS/
Oklahoma Cooperative Extension Service
Division of Agricultural Sciences and Natural Resources
Department of Agricultural Economics
313 Agricultural Hall
Oklahoma State University 74078-6026
Phone: 405-744-6555
Fax: 405-744-8210
http://www2.dasnr.okstate.edu/extension

Publications Available:
County Financial Statement Handbook
OSU Extension Fact Sheets

Oklahoma Department of Libraries
209 N.E. 18th Street
Oklahoma City, Oklahoma 73105
405-521-2502
Fax: 405-525-7804
http://www.odl.state.ok.us

Publications Available:
Directory of Oklahoma (published every two years)
Oklahoma state agencies, boards, commissions, courts, institutions, legislatures, and officers
Oklahoma Department of Transportation
200 N.E. 21st Street
Oklahoma City, Oklahoma 73105
Local Government Division - 405-521-2553
Office Engineering – 405-521-2625
http://www.okladot.state.ok.us

Oklahoma Insurance Commission
2401 N.W. 23rd Street
Oklahoma City, OK 73107
P.O. Box 53408
Oklahoma City, Oklahoma 73152-3408
405-521-3966
Fax: 405-521-6635
http://www.oil.state.ok.us

Oklahoma Press Service, Inc.
An affiliate of the Oklahoma Press Association
3601 North Lincoln Boulevard
Oklahoma City, Oklahoma 73105-5499
888-815-2672 (In Oklahoma)
405-524-4421
http://www.okpress.com

Publications Available:
Oklahoma Open Meeting & Open Records Book
Oklahoma Public Employees Retirement System (OPERS)
5801 North Broadway Extension, Suite 400
Oklahoma City, OK 73118
P.O. Box 53007
Oklahoma City, Oklahoma 73152-3007

800-733-9008
405-858-6737
Fax: 405-521-4718

http://www.opers.state.ok.us

Publications Available:
Oklahoma Public Employees Retirement Handbook

Office of the Oklahoma State Auditor and Inspector (SA&I)
Room 100 State Capitol
Oklahoma City, Oklahoma 73105

405-521-3495
Fax: 405-521-3426

http://csd.sai.state.ok.us

Publications Available:
County Government Chart of Accounts
County Clerk and County Treasurer Forms and Purchasing Forms
Oklahoma State Department of Health
1000 N.E. 10th Street
Oklahoma City, Oklahoma 73117-1299

    800-522-0203
    405-271-5600
Fax: 405-271-3431

http://www.ok.gov/health

Oklahoma Tax Commission
P.O. Box 269060
Oklahoma City, Oklahoma 73126-9060

Ad Valoren Division - 405-319-8200
    Fax: 405-521-0166

http://www.oktax.state.ok.us

Publications Available:
State payments to governments – from Public Information Office
State tax collections – from Public Information Office
Secretary of State
State of Oklahoma
101 State Capitol Building
2300 North Lincoln Boulevard
Oklahoma City, Oklahoma 73105-4897

  405-521-3912
Fax: 405-521-3771

http://www.sos.state.ok.us

State Election Board
Room B-6, State Capitol Building
P.O. Box 53156
Oklahoma City, Oklahoma 73152

  405-521-2391
Fax: 405-521-6457

http://www.ok.gov/~elections/

  Publications Available:
  Roster, state and county officers and elections returns