

**FLEET MANAGEMENT
POLICY / PROCEDURE**

SUBJECT: MECHANIC TOOL ALLOWANCE

APPROVED: Marilyn L. Rawlings
MARILYN L. RAWLINGS, FLEET MANAGER

DISTRIBUTION:

Fleet Management Staff

PURPOSE:

To provide a standard for the implementation and continuation of the county's tool allowance program.

PROCEDURE:

- 1. Each Supervisor will be responsible for monitoring his/her employee's purchases.**
- 2. Only new tools of a known brand name or a quality used by journeyman level technician are allowed.**
- 3. Items such as tie wraps, plugs, fittings, one time use tools and tools not used to perform repairs on County equipment will not be reimbursed under this policy.**
- 4. Tool boxes, tool trays, socket holders, box wheels, drop lights, batteries, extension cords and support components are not covered under this policy.**
- 5. Any full-time regular mechanic required to use tools is eligible for the tool allowance. Probationary employees are not eligible for tool reimbursement.**
- 6. Employees must receive supervisor's approval prior to purchase.**
- 7. Each employee will be responsible to keep track of all new tools purchased. The employee will provide an updated list to Risk Management for insurance and to the Shop Superintendent for the employee's file.**
- 8. The employee must complete the reimbursement request form listing all tools for reimbursement.**
- 9. Tools must be paid in full prior to receiving reimbursement. The invoice date must be in the same fiscal year as the reimbursement. The signed request form along with the actual sales receipt is submitted to Finance by the Fiscal Officer.**
- 10. The employee is reimbursed up to \$500.00 annually on a fiscal year basis. The reimbursement includes the sale tax. Any unspent funds will not be carried over to next year.**

Revision Date: May 2010

**REIMBURSEMENT REQUEST FORM
TOOL PURCHASE REPLACEMENT / REPAIR**

Invoice # _____ **- TOOLS - FY**
Last Name - Tools-FY

Employee Name _____

Division / Section Fleet Management

Employee Vendor # (fiscal Use only) _____

Job Title _____

Tool(s) purchased: _____

Reason for purchase or repair: _____

Maximum of \$500.00 per fiscal year per the Purchasing Manual 10.4.3

Repair \$ _____ Purchase \$ _____ Date of Last Purchase _____

Business Unit: JB5191059400.505280-Fleet
JB5260100100.505280-EMS

Fiscal Approval Date

Supervisor's Signature Date

Superintendent Date

Division Director Date

SECTION 10: UNIQUE PURCHASES

10.0 Cooperative Purchasing Pursuant to Interlocal Agreement

- 10.0.1 Lee County Board of County Commissioners has entered into an Interlocal Agreement with other local governmental entities to provide for a cooperative purchasing effort. In the event Lee County participates in a cooperative bid under this Interlocal Agreement and is not the lead agency, the applicable policies and procedures of the lead agency shall govern the solicitation and award process. After award is made by the "lead agency", the requesting department/division will enter a requisition following procedures outlined in this manual. The term "lead agency" shall mean the member entity responsible for issuance of the cooperative solicitation.
- 10.0.2 When issuing a purchase order for a commodity or service which is part of a cooperative bid, the approval date of the last complete manual revision as well as the lead agency's approval date shall be entered in the Order Attachment since the Board has authorized the use of the cooperative bidding process. The quote number shall be entered in the appropriate field of the requisition.

10.1 Piggybacking

- 10.1.1 When goods and services have gone through a competitive quoting process by another governmental entity (either formal or informal), we have the ability to "piggyback" off their awarded bid and take advantage of the pricing received without going through a competitive process ourselves.
- 10.1.2 Purchasing will verify specification and award information, receive permission from both the entity and the vendor to piggyback, then issue a purchase order following the authorization levels established in Chapter 3.
- 10.1.3 Conversely, Lee County will allow other governmental entities to piggyback on Lee County's quotes when requested.
- 10.1.4 Since piggybacks can be both under and over the formal level, if permission to piggyback on the award has been received from both the vendor and the governmental entity, a purchase order may be issued.
- 10.1.5 Purchases made from the Annual Florida Sheriff's Association Vehicle Contract shall fall under the piggybacking method.
- 10.1.6 Purchases made by using the US Communities Government Purchasing Alliance contracts shall fall under the piggybacking method.

- 10.1.7 Purchases made by using the Western States Contract Alliance contracts fall under the piggybacking method.
- 10.1.8 Purchases made by using Helping Governments Across the Country Buy (HGACBuy) cooperative purchasing program fall under the piggybacking method.
- 10.1.8 Purchases made by using National Association of State Purchasing Officials (NASPO) fall under the piggybacking method.

10.2 State Contract Purchases

- 10.2.1 State Contracts have gone through a competitive process. Use of State Contracts has been approved as exempt purchases. A purchase order may be issued provided the total dollar amount of the purchase is less than formal level. The State Contract Number and the exemption date are entered in the Order Attachment of the REQUISITION.
- 10.2.2 When the total dollar amount of the purchase from State Contract exceeds formal level an Agenda Item Summary sheet must be processed and routed for the Board's approval of the purchase.

10.3 General Services Administration Schedules

- 10.3.1 A General Services Administration Schedule (GSA) is a price agreement between a vendor and the Federal Government.
- 10.3.2 When a vendor offers GSA schedule pricing to Lee County, the GSA number is referenced on the purchase order. If the total dollar amount of the purchase order is less than formal level, a purchase order may be issued. The GSA schedule number and the exemption date are entered in the Order Attachment of the REQUISITION. If the total amount of the purchase exceeds formal level, an Agenda Item Summary sheet must be processed and routed for the Board's approval of the purchase.

10.4 Reimbursement for Tools and Uniforms

- 10.4.1 **Tools** – The Department Director will determine who is required to use tools.
- 10.4.2 The Department Director or his/her designee is responsible for monitoring compliance to requirement.
- 10.4.3 Any full-time regular mechanic required to use his/her own tools may receive reimbursement up to a maximum of \$500 per fiscal year toward the expense of purchase of new replacement or repair of tools. As is the case with all other equipment, this expense is to be considered in the requiring department's budget.
- 10.4.4 **Uniforms** – Uniforms are to be purchased through normal purchasing procedures.
- 10.4.5 Uniform rental services, which include cleaning, are to be used only when job duties normally result in laundering requirements and efforts, due to heavy soiling that exceed that of a normal household wash.
- 10.4.6 Due to the high possibility of contamination, and pending OHSA regulations, Emergency Medical Services is permitted to purchase their uniforms and have them commercially cleaned.