

PURCHASING POLICY EXCEPTION FORM

FROM:

DATE: 02/10/2025

DEPARTMENT: Health and Human Services - Involuntary Housing

VENDOR: Florida Housing Coalition, Inc.

DEPT DIRECTOR/

MGR SIGNATURE: *Nada Sh Ramsey*

DATE: 2-17-2025

Amount of Invoice: \$12,500

Invoice Date: 11/01/2024

The attached request for disbursement does not appear to be in compliance with County Purchasing Policy, for the following reason:

PSA was approved and provided to vendor 9/6/2024 to begin work. Per PSA 24-PS0176/EK RQ241175 was drafted and entered into system 9/18/24 but not approved. Department was not aware that RQ241175 was not approved as we responded to Helene and Milton storm events. The vendor continued their work per PSA. Dept became aware RQ241175 was not approved when invoice was denied payment. The dept was advised to draft a new RQ 250477, which was entered 12/18/24. Dept was asked for an updated COI and complied. PO & invoice is still pending approval to pay vendor.

Please forward all documentation with this form attached, and letter of explanation, to the Chief Procurement Officer.

TO: CHIEF PROCUREMENT OFFICER

Please review, and upon approval, forward to County Administration.

Caleb Rosset - State

Date: 2/18/2025

Resolution: Approved, PO 25000508 is now in place for remaining contractual services.

To process this disbursement, the request must be approved by the County Administrator.

TO: COUNTY ADMINISTRATOR

Please review, and upon approval, forward to the Finance Department for processing.

APPROVED FOR PAYMENT:

COUNTY ADMINISTRATOR (or designee): *[Signature]*

DATE: 2/19/25

APPROVED FOR PAYMENT:

FINANCE DIRECTOR/

ASST. FINANCE DIRECTOR

APPROVED

By Joshua Stringfellow at 5:06 pm, Feb 23, 2025

Date: _____

PO 25000508

Florida Housing Coalition, Inc.
1311 N Paul Russell Rd
Suite B201
Tallahassee, FL 32301



Hernando County
621 West Jefferson Street
Brooksville, FL 34601

Invoice 21740

| | |
|---------------------|--------------|
| Date | Nov 01, 2024 |
| Service Thru | Oct 31, 2024 |

| Services | Amount |
|---|---------------------|
| Policy Paper on Voluntary Inclusionary Housing in Hernando County | \$ 12,500.00 |
| Total Invoice Amount | \$ 12,500.00 |

Submitted for payment 1-27-25

Denise Flores

From: Amy Norris
Sent: Wednesday, February 19, 2025 1:11 PM
To: Emily Childs; Denise Flores
Subject: FW: PO 25000508 - receiving

Importance: High

See below. Thanks.

Amy Norris

Accounts Payable | Account Payable Auditor I
Office of Doug Chorvat Jr., Clerk of Circuit Court and Comptroller
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From: Barbara Gardner <bgardner@co.hernando.fl.us>
Sent: Wednesday, February 19, 2025 1:09 PM
To: Lindsey Brown <lindseyb@co.hernando.fl.us>; Amy Norris <anorris@hernandoclerk.org>
Cc: Veda Ramirez <VRamirez@co.hernando.fl.us>
Subject: RE: PO 25000508 - receiving
Importance: High

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Hi Lindsey and Amy

I received the Purchasing Policy Exception form signed. Resolution: Approved, PO 25000508 is now in place for remaining contractual services. I believe this means we do not have to do a change order to close out the PO or enter a non-PO request (correct me if I am wrong). Please note, this is still a rush payment.

Please advise on the payment status.

Thank you,
Bobbi



**Barbara (Bobbi) Gardner | Administrative/Finance Coordinator
Housing and Support Services**

Hernando County Board of County Commissioners
621 West Jefferson Street, Brooksville, FL 34601
Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Lindsey Brown <lindseyb@co.hernando.fl.us>
Sent: Wednesday, February 19, 2025 10:01 AM
To: Barbara Gardner <bgardner@co.hernando.fl.us>
Subject: RE: PO 25000508 - receiving

Yes, that is correct. Hopefully it'll be a quick process.

Also, I reached out to our Toshiba rep to ask for pricing for the hole punch options. I will let you know when I hear back.

Thank you,
Lindsey

From: Barbara Gardner <bgardner@co.hernando.fl.us>
Sent: Tuesday, February 18, 2025 4:01 PM
To: Lindsey Brown <lindseyb@co.hernando.fl.us>
Subject: RE: PO 25000508 - receiving

Will do. I just sent the sign Policy Exception Form to Carla today. I know once it goes through the system, we will need to do the change order to close out the PO and a non-PO request for payment. If I read the form correctly, we have to wait for the County Administrator's signature on the form to proceed.

Thanks,
Bobbi



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Housing and Support Services**

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Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Lindsey Brown <lindseyb@co.hernando.fl.us>
Sent: Tuesday, February 18, 2025 3:42 PM
To: Barbara Gardner <bgardner@co.hernando.fl.us>
Subject: RE: PO 25000508 - receiving

Hi Bobbi,

Let me know when you want to enter the change order to close this PO.

Thank you,
Lindsey

From: Barbara Gardner <bgardner@co.hernando.fl.us>
Sent: Monday, February 10, 2025 1:21 PM
To: Lindsey Brown <lindseyb@co.hernando.fl.us>; Amy Norris <anorris@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

Thank you,
Bobbi



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Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Lindsey Brown <lindseyb@co.hernando.fl.us>
Sent: Monday, February 10, 2025 12:25 PM
To: Barbara Gardner <bgardner@co.hernando.fl.us>; Amy Norris <anorris@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

Hello,

Hopefully, this will clarify a little bit.

RQ250477 was created on 12/11/24 and did not make it through the PO approvals until 1/23/25. I remember RQ241175 that had been started but that was right before the fiscal year end and it would have needed to close on 9/30/24. A new RQ for this should have been entered on 10/1/24 when the FY rolled over but was not entered until 12/11. By then, services were already performed and it was too late for a PO to go through the process.

Thank you,
Lindsey

From: Barbara Gardner <bgardner@co.hernando.fl.us>
Sent: Monday, February 10, 2025 12:14 PM
To: Lindsey Brown <lindseyb@co.hernando.fl.us>; Amy Norris <anorris@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

I am working on completing the Policy Exception Form, just wanted to clear up a couple of things. The PO Req 250477 date was 9/30 and we did not receive the invoice until November.

There actually was another PO Req done on 9/18/25 RQ241175 that had been started by another member of the HHS staff. She was training me on how to request a PO. It was my 2nd day. I am not sure what happened with that one, but we were asked to start a new PO Req. which was the 250477.

I am still learning the entire PO process and I am a little confused.

Thanks for all your help!!

Bobbi



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Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Lindsey Brown <lindseyb@co.hernando.fl.us>

Sent: Monday, February 10, 2025 11:02 AM

To: Barbara Gardner <bgardner@co.hernando.fl.us>

Subject: RE: PO 25000508 - receiving

Hi Barabara,

After going through the whole PO process and now finding out the services were already performed, a PPE will be required as Finance mentioned. Please fill out this form along with the invoice and email it to Carla Rossiter-Smith for approval.

Thank you,
Lindsey

From: Barbara Gardner <bgardner@co.hernando.fl.us>

Sent: Monday, February 10, 2025 10:16 AM

To: Lindsey Brown <lindseyb@co.hernando.fl.us>

Subject: FW: PO 25000508 - receiving

Good morning Lindsey,

I am going to need your help with this PO and payment. Maybe if you have time this afternoon. We really need to get this one paid since it was supposed to be paid last September.

Thanks very much!!
Bobbi



**Barbara (Bobbi) Gardner | Administrative/Finance Coordinator
Housing and Support Services**

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621 West Jefferson Street, Brooksville, FL 34601
Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Amy Norris <anorris@hernandoclerk.org>
Sent: Wednesday, February 5, 2025 5:42 PM
To: Barbara Gardner <bgardner@co.hernando.fl.us>
Cc: Emily Childs <echilds@hernandoclerk.org>; Denise Flores <dflores@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

Good afternoon, Barbara. 😊

Please reach out to procurement for instructions on processing a PPE. There is a form but I want to make sure you have the most current, correct process.

Thank you.

Amy Norris

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From: Barbara Gardner <bgardner@co.hernando.fl.us>
Sent: Wednesday, February 5, 2025 3:10 PM
To: Amy Norris <anorris@hernandoclerk.org>
Cc: Emily Childs <echilds@hernandoclerk.org>; Denise Flores <dflores@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

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I can do the Non-PO request, just need help with the procurement policy exception and the change order to close the PO. Do you want me to go ahead and enter the non-PO request?

Thank you,
Bobbi



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621 West Jefferson Street, Brooksville, FL 34601
Phone: (352) 540-4338
Fax: (352) 540-4339
Email: bgardner@co.hernando.fl.us

From: Amy Norris <anorris@hernandoclerk.org>
Sent: Wednesday, February 5, 2025 11:00 AM
To: Barbara Gardner <bgardner@co.hernando.fl.us>
Cc: Emily Childs <echilds@hernandoclerk.org>; Denise Flores <dflores@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

Good morning, Barbara. 😊

On further review of the invoice, I found that the services were completed before the purchase order was done. Due to that circumstance, a procurement policy exception will need to be done to pay this invoice. Please enter a non-po request. A change order will need to be done to close the PO. I apologize for any inconvenience.

Thank you.

Amy Norris

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From: Amy Norris
Sent: Monday, February 3, 2025 10:19 AM
To: Barbara Gardner <bgardner@co.hernando.fl.us>
Cc: Emily Childs <echilds@hernandoclerk.org>
Subject: RE: PO 25000508 - receiving

Good morning, Barbara. 😊

Thank you. Please receive “1” on each line with a date of 1/27/25.

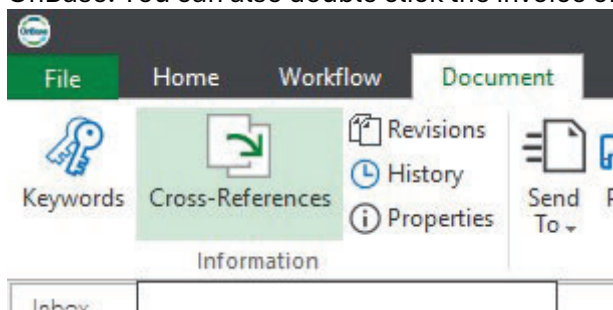
No. “Job” and “ea” are just units of measure. You have to look at the PO.

I took out the middle description so you can see the headings and used green lines to highlight the columns:

| ITEM# | QUANTITY | UOM | DESCRIPTION | UNIT PRICE | EXTENSION |
|-------|----------|-----|---|------------|-----------|
| 01 | 1.00 | JOB | WORK PRODUCT A: IDENTIFYING VALUABLE INCENTIVES | 6250.0000 | 6,250.00 |
| 02 | 1.00 | JOB | WORK PRODUCT B: RECOMMEND PROVISIONS TO INCLUDE IN A COUNTY IHO POLICY. | 6250.0000 | 6,250.00 |

This one is a quantity of 1 at a unit price of \$6,250.00 – extended price (the total for the line) is \$6,250.00. When you receive 1, in the background of Finance plus you are receiving \$6,250.00. That’s what should be on your invoice. For this one when you receive “1” on both lines, you are actually telling Finance Plus you are processing an invoice for \$12,500.00. We are hoping the next software will do a better job of this. It’s confusing this way. We agree with you there.

You can find the PO when in import an invoice and go to the “Document” tab and the “cross references” tab in OnBase. You can also double click the invoice once it is imported.



This is an example of a line you would receive as the cash value. The quantity is equal to the cash value of the line and the unit price is \$1.00.

| ITEM# | QUANTITY | UOM | DESCRIPTION | UNIT PRICE | EXTENSION |
|-------|-----------|-----|--|------------|------------|
| 01 | 150000.00 | LOT | DISPOSAL AND TRANSPORTATION OF LEACHATE ON AN AS-NEEDED BASIS. | 1.0000 | 150,000.00 |

25000508 has nothing received now. There should be a “1” in received to date.

Date: Period:

Receive Ordered Materials Data

| | | | | | |
|---|----------|----------|-------|-------------------------------|--------------------------|
| P O Number | 25000508 | Vendor | 17209 | FLORIDA HOUSING COALITION INC | |
| Commodity | | Item No. | 1 | Asset | <input type="checkbox"/> |
| WORK PRODUCT A: IDENTIFYING VALUABLE INCENTIVES | | | | Ordered | |
| | | | | Rec'd To Date | |
| | | | | Measure | JOB |
| | | | | Stock Number | |
| | | | | Received | |
| | | | | Date Received * | 01/ |
| Commodity | | Item No. | 2 | Asset | <input type="checkbox"/> |
| WORK PRODUCT B: RECOMMEND PROVISIONS TO INCLUDE IN A COUNTY IHO POLICY. | | | | Ordered | |
| | | | | Rec'd To Date | |
| | | | | Measure | JOB |
| | | | | Stock Number | |
| | | | | Received | |
| | | | | Date Received * | 01/ |

Thank you!! I hope this makes things a little clearer than mud. 😊

Have a great day!!

Amy Norris

From: Barbara Gardner <bgardner@co.hernando.fl.us>

Sent: Monday, February 3, 2025 9:54 AM

To: Amy Norris <anorris@hernandoclerk.org>

Subject: RE: PO 25000508 - receiving

CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Good morning Amy,

Please look at the order received for PO 25000508. I believe I made the correction. Let me know if you need me to do anything else.

So when it is a "JOB" based on quantity, I don't put in the \$ value received. Only when it says "EA". Is that the correct way to enter?

Thank you,
Bobbi



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Housing and Support Services**

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621 West Jefferson Street, Brooksville, FL 34601

Phone: (352) 540-4338

Fax: (352) 540-4339

Email: bgardner@co.hernando.fl.us

From: Amy Norris <anorris@hernandoclerk.org>

Sent: Friday, January 31, 2025 4:20 PM

To: Barbara Gardner <bgardner@co.hernando.fl.us>

Cc: Emily Childs <echilds@hernandoclerk.org>

Subject: PO 25000508 - receiving

Good afternoon, Barbara!! 😊 ... or morning by the time you read this. 😊

The amount received cannot exceed what was ordered.


This PO is based on quantity and not the cash value of the line.

Please receive -6,249.00 with a date of 1/27/25 so each line only has 1 received.

Thank you.

Date: Period:

Receive Ordered Materials Data

P O Number  Vendor FLORIDA HOUSING COALITION INC

Commodity Item No. Asset ☐ Ordered ☐

WORK PRODUCT A: IDENTIFYING VALUABLE
INCENTIVES

Rec'd To Date
Measure

Stock Number

Received

Date Received *

Commodity Item No. Asset ☐ Ordered ☐

WORK PRODUCT B: RECOMMEND PROVISIONS TO
INCLUDE IN A COUNTY IHO POLICY.

Rec'd To Date
Measure

Stock Number

Received

Date Received *

Amy Norris

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