



# FLORIDA DEPARTMENT OF JUVENILE JUSTICE PROCEDURE

**Title:** Perquisites Procedures

**Related Policy:** FDJJ – 1002.24

## I. DEFINITIONS

**Employee** – Any person employed for wages or salary in a Senior Management Service, Selected Exempt Service, Other Personal Services (OPS) or Career Service position with the FDJJ.

**Executive Management Employee** – An employee in a Senior Management Service position e.g., Secretary, Deputy Secretary, Assistant Secretary, Inspector General, General Counsel or Chief of Staff.

**Moving Expenses** - The cost of packing and shipping household goods or moving a mobile home. Moving expenses shall be approved, procured and paid in accordance with FDJJ – 1675, Purchasing Policy and Procedures.

**Perquisites** – Those things, or the use thereof, or services of a kind that confer on the employees receiving some benefit that is in the nature of additional compensation, or that reduce to some extent the normal personal expenses of the employee receiving them (including, but not limited to such things as uniforms, housing, subsistence, utilities, laundry services, medical services, and moving expenses).

**Perquisite Approvals Report** – The form used by the Bureau Chief of Personnel (HQ) to annually report approved perquisites to the Department of Management Services. (Attachment 2)

**Request for Approval of Perquisite or Sale of Goods and Services** – The form used to request approval to pay for perquisite expenses. (Attachment 1)

**Selected Exempt Service Manager** – An employee in a Selected Exempt Service position e.g., Superintendent, Chief, Director or Administrator who are not in the Career Service or the Senior Management Service.

**Senior Management Service Employee** – An employee in a Senior Management Service position e.g., Secretary (Agency Head), Deputy Secretary, Assistant Secretary, Deputy Assistant Secretary, Inspector General, Chief of Staff or General Counsel.

## II. STANDARDS/PROCEDURES

### A. Requesting a Perquisite or Sale of Goods and Services:

1. Selected Exempt Service (SES) Managers shall determine that a perquisite is needed for his/her employees.
2. The SES Manager shall contact the Bureau Chief of Personnel (HQ) to determine if a new perquisite is necessary or if an existing approved perquisite may be used.

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3. If a new perquisite is needed, the SES Manager shall submit a written request through the chain of command to the Executive Management employee of his/her branch, at least ninety-days prior to the requested effective date, attaching the completed Request for Approval of Perquisites or Sale of Goods and Services Request form (Attachment 1) with documentation of how costs were derived, as associated with the perquisite or sale of goods and services.
4. The SES Manager is encouraged to use minority vendors and to follow appropriate purchasing policies and regulations in searching for a vendor.
5. The SES Manager shall complete the Request for Approval of Perquisites or Sale of Goods and Services form (Attachment 1), by completing blocks titled:
  - a. Agency Name and Address
  - b. Request (check a, b, c, or d, as appropriate).
  - c. County Code
  - d. Facility (enter full name of facility, not acronyms)
  - e. Address (enter address of facility, whose employees will receive the perquisite)
  - f. Classification Information (enter a through d)
  - g. Justification
  - h. Item Description (enter Perquisite category code and Description Narrative)
  - i. Per Unit Cost Information (enter a through f)
  - j. Total Annual Cost for all Positions
6. The Bureau of Personnel shall provide assistance to managers, as requested.
7. Executive Management employees shall receive and review the Request for Approval of Perquisites or Sale of Goods and Services form, along with documentation of costs.
8. If not recommending approval, the Executive Management employee shall indicate the reason(s) for denial in the margin of the Request for Approval of Perquisites or Sale of Goods and Services form, initial the form and return it to the initiating SES manager (with a copy to the Bureau Chief of Personnel).
9. If recommending approval, the Executive Management Employee shall:
  - a. Prepare a memorandum for the Secretary or their designee to approve or deny the request.
  - b. Advise the SES manager that until the Secretary or their designee approves the Request, the perquisite may not be further processed.
  - c. Submit the memorandum of recommendation, with attachments, to the Secretary or their designee for final approval or denial of the request.

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10. The Secretary or their designee shall receive and review Requests for Perquisites or Sale of Goods and Services forms along with documentation of the costs associated with the perquisite.
11. The Secretary or their designee may contact the Executive Management employee for further information or return the Request for Perquisites or Sale of Goods and Services form and documentation to the Executive Management employee with further direction.
12. The Secretary or their designee shall complete the Request for Perquisites or Sale of Goods and Services form by checking "Action Taken" (approved/disapproved) and signing the form on the signature line.
13. If applicable, the Secretary or their designee shall sign the Purchase Requisition, if approving the perquisite, returning the Request for Perquisites or Sale of Goods and Services form and attachments to the Bureau Chief of Personnel for further processing.
14. Upon receipt of the decision from the Secretary or their designee, the Bureau Chief of Personnel shall notify the Executive Management employee making the request by providing him/her with the a copy of the completed Request for Perquisites or Sale of Goods and Services form. The Bureau Chief of Personnel shall maintain documentation of the final decision on a Request for Perquisites or Sale of Goods and Services form. Additional copies shall be provided to the Bureaus of General Services (Purchasing & Leasing), and Finance & Accounting.
15. The Bureau Chief of Personnel shall retain the original documentation of the final decision on a Request for Perquisites or Sale of Goods and Services. Documentation shall be maintained by fiscal year of final agency action on Requests for Perquisites or Sale of Goods and Services.
16. The Bureau Chief of Personnel shall file a Perquisite Approvals Report annually by the deadline required, with the Department of Management Services.
17. The Bureau Chief of Personnel shall confirm with the Bureaus of General Services (Purchasing & Leasing), and Finance and Accounting (HQ) their receipt of the Request for Perquisites or Sale of Goods and Services form and documentation.
18. Regional purchasing/fiscal liaisons shall receive the My Florida Market Place purchase requisition for the purchase of the perquisites through the appropriate levels of approval, including Headquarters, as appropriate.
19. Regional purchasing/fiscal liaisons shall review the requisition for compliance of purchasing policies and procedures and for finance and accounting codes.
20. Regional purchasing/fiscal liaisons shall approve the requisition, forwarding it to the Bureaus of General Services (Purchasing & Leasing), and Finance and Accounting (HQ) for final approval to create the My Florida Market Place direct order.
21. The Purchasing Director, Bureau of General Services (Purchasing & Leasing) (HQ), shall receive the My Florida Market Place purchase requisition for the purchase of the perquisites

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through the appropriate levels of approval, including regional or Headquarters purchasing/fiscal liaisons, as appropriate.

22. The Purchasing Director shall review the requisitions for compliance with purchasing policies and procedures, obtain approval for CMBE exemption requests and verify that all approval documentation is attached to electronic requisitions. The Purchasing Director shall approve the requisitions, creating the My Florida Market Place direct orders.
23. The My Florida Market Place direct order is then electronically sent to the Vendor via email or facsimile.

### III. RESPONSIBILITY AND DUTIES

#### A. Selected Exempt Service Manager

1. May initiate a Request for Approval of Perquisites or Sale of Goods and Services, for employees within his/her span of control.
2. Shall attach to the Request for Approval of Perquisites or Sale of Goods and Services documentation regarding the costs that will be associated with the purchase or sale of goods and services.
3. Follows purchasing rules and policies in the recommendation of the vendor.
4. Submits his/her Request for Approval of Perquisites or Sale of Goods and Services, with attached documentation, through the chain of command to the Executive Management employee of his/her branch.
5. Is not authorized to expend agency funds for the perquisites until the Secretary or their designee has approved the request.
6. Receives a copy of the approval/denial of Request for Approval of Perquisites or Sale of Goods and Services form, with attachments.
7. If approved, proceeds with the purchase or sale of goods and services, via a My Florida Market Place requisition and includes the Request for Approval of Perquisites or Sale of Goods and Services Form and quotes as an attachment to the My Florida Market Place requisition. **A purchasing card may not be used for moving expenses.** See Purchasing Procedure (FDJJ - 1675).
8. Retains the documents, associated with the Request for Approval of Perquisites or Sale of Goods and Services, in compliance with the appropriate administrative records policy of the State of Florida.

#### B. Executive Management Employee

1. Upon receipt of the Request for Approval of Perquisites or Sale of Goods and Services form, with attachments, from the SES manager, reviews the request and documents.
2. If recommending approval, prepares a memorandum for the Secretary or their designee to approve or deny the Request for Approval of Perquisites or Sale of Goods and Services.

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3. Submits the memorandum of recommendation, with attachments, to the Secretary or their designee for final approval or denial of the request(with a copy to the Bureau Chief of Personnel).
4. If not recommending approval indicates denial in the margin of the Request for Approval of Perquisites or Sale of Goods and Services form, initials the form and returns the form to the initiating SES manager.
5. Receives the decision of the Secretary or their designee advising the Bureau Chief of Personnel who will notify the requesting SES manager of the approval/denial of the Request for Approval of Perquisites or Sale of Goods and Services.
6. If approved or denied, returns the original Request for Perquisites or Sale of Goods and Services form and any attached documents to the initiating manager for retention (if denied) or further processing (if approved).

**C. Secretary or Designee**

1. Receives and reviews the Request for Perquisites or Sale of Goods and Services form and attachments.
2. Approves or denies the request, by so indicating his/her decision on the Request for Perquisites or Sale of Goods and Services form and signing the Purchase Request, if appropriate.
3. Returns the completed Request for Perquisites or Sale of Goods and Services form, with attachments to the Bureau of Personnel (HQ) for further action.

**D. Bureau of Personnel (HQ)**

1. The Bureau Chief of Personnel (HQ) provides technical assistance to managers regarding the perquisite policy.
2. The Bureau Chief of Personnel receives the Request for Perquisites or Sale of Goods and Services form, cover memorandum and documentation from the Executive Management employee, conducts a compliance review of the request, requests additional information from the initiating manager, if necessary and routes the Request for Perquisites or Sale of Goods and Services form, with attachments to the Secretary or their designee.
3. The Bureau Chief of Personnel receives the decision on the Request for Perquisites or Sale of Goods and Services form from the Secretary or their designee.
4. The Bureau Chief of Personnel maintains a file of final agency action on the Request Perquisites or Sale of Goods and Services.
5. Each June, the Bureau Chief of Personnel shall verify cost information (annual cost to the State, annual maintenance allowance cost and fair market value) of each approved perquisite category (e.g., housing, uniforms, etc.) with each Program Office and the Bureau of Finance and Accounting.

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6. The Bureau Chief of Personnel must file a Perquisite Approvals Report annually of the total cost for each applicable perquisite category with the Department of Management of Services and provide a copy to the Secretary or their designee.

**E. Regional Purchasing/Fiscal Liaisons**

1. Receive the My Florida Market Place purchase requisition for the purchase of the perquisites through the appropriate levels of approval, including Headquarters.
2. Review the requisition for compliance of purchasing policies and procedures and for finance and accounting codes; making sure a detailed description of the item(s) and price per unit are notated.
3. Approve the requisition, forwarding it to the Bureau of General Services, Purchasing & Leasing (HQ) for final approval to create the My Florida Market Place direct order.

**F. Bureau of General Services, Purchasing & Leasing (HQ)**

1. Receive the My Florida Market Place purchase requisition for the purchase of the perquisites through the appropriate levels of approval, including the regional or Headquarters purchasing/fiscal liaisons, as appropriate.
2. Approve the action, creating the My Florida Market Place direct order.

**G. Bureau of Finance and Accounting – HQ**

1. Maintains a record of expenditures regarding the total amount spent on uniform perquisites and forwards to the Bureau chief of Personnel each June.

**IV. ATTACHMENTS**

Attachment 1 - Request for Approval of Perquisites or Sale of Goods and Services

Attachment 2 – Approved Perquisite Categories