

PURCHASING PROCEDURES

A. Requisitions

1. Requests for supplies, equipment and maintenance work are to be submitted to the principal or the appropriate departmental administrator before the Business Services Department will proceed with a purchase.
2. In the processing of requisitions, consideration will be given to availability of budgetary appropriations and the priority of District needs.
3. The levels of authority for approving purchases are as follows:
  - a. The Director responsible for Business Services shall be authorized to approve purchases up to \$5,000 for equipment or services. If the purchase is over \$2,500, two price quotations shall be obtained in writing whenever possible or the purchase must have the approval of the Director responsible for Business Services.
  - b. Purchases over \$5,000 for equipment or services shall require three written quotations whenever possible and the approval of the Director responsible for Business Services. When it is not possible to obtain three written quotations, approval of the Superintendent of Schools is required.
  - c. The Director responsible for Business Services shall be authorized to approve the purchase of supplies and to contract for equipment maintenance agreements in keeping with sound purchasing procedures.

B. Bidding

1. Requirements
  - a. Construction - All construction, including new construction, remodeling, alteration or repair in which the estimated cost exceeds \$10,000 shall be let by contract according to the following procedures.

Any maintenance or construction related work that is less than \$10,000 shall be considered minor in nature and shall not require written bids.

The bidding procedure is not mandatory for the repair and reconstruction of facilities when damage or potential damage creates an emergency.
  - b. Equipment/Machinery - Equipment/machinery in which the estimated cost may exceed \$10,000 shall be acquired through either advertised or invitational bidding procedures. For invitational bids, the sections below on "Specifications" and "Bids" shall apply.

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- c. Health Care Benefits - When selecting group health care benefits for school district professional employees, bids shall be solicited in accordance with state law requirements.
  - d. The District shall also abide by any bidding requirements agreed to by the District in contracts with state or federal agencies.
2. Specifications - Bid specifications shall be developed and will be coordinated between the user and the Director responsible for Business Services. If developed by a vendor, provision will be made for non-proprietary equipment of comparable quality. The specifics should not be designed to give preference to a particular vendor or to exclude a particular vendor. Continuing efforts shall be made to effect savings in purchasing and maintenance through the standardization of specifications for similar items used throughout the District.

Prior to advertising, the District shall cause to be filed, in a designated place in the Administrative Building and on the District website, information for bidders and others. Such information shall include specifications and description material as are necessary to inform the bidder of the subject matter of the bid. No specifications should set up such requirements as would result in the elimination of competition.

3. Advertising - A notice requesting bids and/or prequalification of bidders shall be published in the official District newspaper and in such other publications as may be deemed appropriate. The District will contact bidders when necessary in order to facilitate the bidding process.
4. Bids
  - a. All bids must be submitted in sealed envelopes, and plainly marked with the name of the bid and the time of the bid opening. A bid can be submitted via email to a secure District email address which will be provided within the bid specifications. Any bid received after the time and date specified shall not be considered. Bids shall be opened at the time indicated by the specifications. The District reserves the right to reject any or all bids and to accept the bid deemed to be in the best interest of the District and to negotiate with the awarded bidder.
  - b. Bids shall be evaluated given consideration to best pricing, quality, conformity to developed specifications, reliability of the provider, delivery terms and suitability to the requirements of the District.
  - c. The bidder to whom the award is made may be required to enter into a written contract with the District. Contracts may include clauses providing for increasing the quantity required in the original contract by an amount not to exceed 15% or \$20,000 of the original contract price. The results of the bidding shall be available from the Office of Business Services upon request.

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- d. If upgrades and/or changes to a District-approved construction project that originally estimated a budget of equal to or greater than \$100,000 in value are later anticipated to exceed the approved bid price due to unforeseen circumstances by either \$50,000 or 20% of the original estimate, whichever is less, then a report shall be provided to the Board detailing the need for the additional cost and the funding source for the upgrades and/or changes.

The Business Services Committee will also review those approved construction projects which originally estimated a budget of equal to or greater than \$100,000 in value which are anticipated to exceed by either \$50,000 or 10% of the original estimate, whichever is less.

In some cases it may be necessary to plan for the proposed upgrade or change as a separate project in a future year rather than adding the change or upgrade to the current project.

C. Exceptions to Bid/Requisition Requirements

The Director responsible for Business Services may establish such limitations as deemed necessary and appropriate for securing verbal or written quotations for purchases not covered by bid or requisition requirements.

Exceptions to procedures for seeking competitive quotations may govern the purchase of:

1. Textbooks, books, tapes, films, workbooks, educational kits, periodicals
2. Replacement parts for existing equipment where the value of the replacement parts is estimated to be less than 50% of the total value
3. CESA contracts
4. Goods or services required to be furnished under any contract where a negotiated extension may be in the best interest of the District (e.g. transportation, service contracts, legal, audit, consultants)
5. Maintenance done on a routine or as needed basis, to specified equipment, including cost for all repair or replacement parts
6. All utilities, i.e., electricity, gas, telephone, etc.
7. Those items purchased from the state contract, governmental purchasing bids, or other educational institutions bids or contracts
8. Purchase or proprietary equipment (sole source), and there is a reasonable assurance of cost control

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**D. Purchase Orders**

1. Approved purchase orders are required prior to all purchases except petty cash purchases.
2. The authority for issuing purchase orders is delegated to the Director responsible for Business Services by the Superintendent.
3. Confirmation of requisitions/purchase orders require advanced approval, either by writing or by telephone, from the Director responsible for Business Services/Designee before committing the District to a purchase of supplies or equipment. Failure to follow proper procedures may result in disciplinary action and/or return of merchandise.

APPROVED: June 1, 1981

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September 11, 1990  
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