

Book	Policy Manual
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Title	Purchasing Procedures
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Purchasing Procedures

General

1. The Board designates the Superintendent as the purchasing agent.
2. No person may commit the District to a purchase without the appropriate certificate of the availability of funds.
3. The materials, equipment, supplies and/or services to be purchased are of the quality required to serve the function in a satisfactory manner, as determined by the requisitioner and the Superintendent.
4. It is the responsibility of the requisitioner to provide an adequate description of the item(s) purchased so that the purchasing agent may be able to prepare the specifications and to procure most expeditiously and economically the desired commodity and/or service. A source of supply should be included on requisitions for specialty or unusual items.
5. No requisitioner shall knowingly restrict competition or otherwise preclude the most economical purchase of the required items.
6. When a low bidder proposes an alternate as equal to that specified, it is the responsibility of the Treasurer to determine whether the proposed substitution is, in fact, an equal. Such decision is based on his/her evaluation and that of the requisitioner. In the case of disagreement between the requisitioner and the Treasurer, either party may refer the matter to the Superintendent.

Requisitions

1. The District establishes a standardized requisition procedure to allow authorized representatives to submit requests for the purchase of materials and supplies.
2. The following are designated as "requisitioner"; that is, they are authorized to issue requisitions against stipulated segments of budgetary appropriations: the Superintendent, administrative assistants, directors, supervisors and building principals. Each requisitioner is responsible for limiting his/her requisitions to the appropriate amounts.
3. Only District-approved methods or forms are used for requisitioning.
4. A requisition, to be considered appropriate for processing, meets the following requirements:
 - A. contains adequate information and
 - B. is approved by and bears the signature of an authorized requisitioner.
5. All approved requisitions are submitted to the Treasurer.
6. After a purchase order has been issued by the Treasurer's office, the number of the purchase order is recorded on the requisition.
7. After processing, the original copy of the requisition is filed in the office of the Treasurer.

Purchase Orders

1. Purchase orders are prepared by the appropriate person and at a minimum include the following essentials:
 - A. a specification that adequately describes to the supplier the characteristics and the quality standards of the item required;
 - B. a firm, quoted, net-delivered price, whenever possible (unit prices are shown);
 - C. clear delivery instructions, including place and time;
 - D. appropriate account code number or appropriation code and
 - E. the Treasurer's certificate of available revenue and appropriation.
2. Purchase orders use an identifiable tracking system established by the District and contain the appropriate number of copies to meet District needs.
3. Verbal confirmation orders subject to subsequent confirmation by a written purchase order may be issued only in cases in which a bona fide emergency situation exists that can be handled only by this procedure:
 - A. whenever possible, a purchase order number should be given to the supplier and
 - B. a confirming requisition is issued immediately, marked "confirmation" indicating the purchase order number, if one was given.

Federal Procurement

Purchasing of goods and services using federal funds must be done in accordance with the above procedures and also in accordance with all federal requirements including allowability of costs. All purchases must be reasonable and free of conflicts of interest and conducted in a manner providing full and open competition.

No purchase will be made using federal funds unless the District verifies that the contractor is not suspended or debarred.

To determine which procurement method type is required, the District will (customize to reflect process: this may be looking back at the last three years of expenditures for the specific goods or services to be purchased with federal funds and determine which method of procurement/contract type is applicable to the individual situation based on the average aggregate amount spent with the providing vendor in a fiscal year or another similar method).

Once the threshold has been established, the following methods of procurement will be used for all purchases of goods and services made with federal funds.

Informal Procurement Methods

1. Micro-purchases are purchases up to \$10,000 and may be made in accordance with District purchasing procedures when the costs are reasonable, based on research, experience, purchase history or other information and documents. To the maximum extent practicable, these purchases are distributed equitably among qualified suppliers.
2. Small purchase are purchases between \$10,000 and \$250,000. Prior to authorizing the purchase, the District will ~~try to~~ obtain price rates or quotations from a minimum of 2 vendors or providers. The District will obtain these price rates or quotations by (customize to reflect process: this may include but not be limited to obtaining quotes verbally, in writing, using price listing on websites, etc.).

Formal Procurement Methods

1. Sealed bid procedures are used for firm fixed price contracts over \$250,000 and is used as the preferred method for construction projects. Bids are solicited from an adequate number of known suppliers, which cannot be less than two responsible bidders. The District will solicit bids by (customize to reflect process: this may be using the same process you use for bidding projects with state funds). The contract will be awarded to the lowest responsive and responsible bidder.
2. Competitive proposals are used for all fixed price or cost reimbursement contracts purchases over \$250,000 for which sealed bids are not appropriate and must be used for architectural or engineering services. ~~Contracts entered into for competitive proposals may be fixed price or cost reimbursement.~~ The District will publicize a request for proposal by (customize to reflect process: this may be using various advertising methods including but not limited to, radio, internet, newspapers, etc.). The District will evaluate proposals in order to award the contract to the most advantageous proposal when considering cost and other factors. The District will evaluate proposals by (customize to reflect District process, many districts have a score sheet they use for these purposes and may refer to this and include specific details on items factored in).

Noncompetitive Procurement

Noncompetitive procurement can only be awarded if one or more of the following circumstances apply:

1. the aggregate amount does not exceed the established micro-purchase threshold.
2. ~~Sole source procurement is used only when~~ the goods or services are only available from a single source;
3. a public exigency or emergency exists;
4. the applicable pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from the District or
5. after solicitation of a number of sources, competition is determined inadequate. there is inadequate competition and the applicable pass-through entity approves this method.

All solicitations:

1. Include clear and accurate description on the technical requirements for the material, product or service to be procured. This description sets forth the minimum and essential characteristics the material, product or service must meet.
2. Will not contain specifications that unduly restrict competition.
3. Identify all requirements offerors must fulfill and all other factors to be used in evaluating bids or proposals.

The District also complies with all fund specific obligations. The District includes the following clauses in contracts when required for the fund type:

1. equal employment opportunity
2. termination for cause and convenience
3. contract work hours/safety standards
4. Davis Bacon Act provisions
5. rights to inventions made under a contract
6. debarment and suspension
7. Byrd Anti-Lobbying Amendment language.

To the extent required by law, the District shall require that the person awarded a contract satisfy the bonding requirements set forth in the applicable Federal regulations.

The District maintains records to verify selection of procurement type and compliance with applicable procurement requirements.

NOTE: Most boards wish to review and give their official stamp of approval to procedural regulations involving purchasing, but a board would not be expected to develop such a regulation—only to review and approve it.

The Uniform Grant Guidance (Uniform Guidance) outlined in 2 CFR 200 outlines the requirements for purchases made through the use of federal funds. Districts should ensure District procedures for purchasing items with federal funds are in compliance with the Uniform Guidance requirements. Districts may customize this regulation to reflect District practice for purchases made with federal funds.

