



Book	Policy Manual
Section	6000 Finances
Title	PURCHASING
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Last Revised	February 8, 2016

6320 - **PURCHASING**

Procurement of all supplies, materials, equipment, and services paid for from District funds shall be made in accordance with all applicable Federal and State statutes, Board of Education policies and administrative guidelines and procedures. Standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts are established in Board Bylaw 0144.3 and Board Policy 1130, Policy 3110 and Policy 4110.

All procurement transactions shall be conducted in a manner that encourages full and open competition and/or in accordance with good administrative practice and sound business judgement.

The Superintendent and/or his/her designee is/are authorized to use discretion in deciding whether the purchase of supplies, materials, and equipment or the construction, repair or renovations of buildings when the cost is at or below the threshold amount as listed in the Michigan School Code of 1976, as amended, 380.1274, will be made on a non-negotiated basis, by informal or formal quotation, or by competitive bid. The Superintendent and/or his/her designee will establish written administrative guidelines and procedures for implementation of this Board policy.

Competitive Bids for Supplies, Materials, and Equipment which Exceed State of Michigan Threshold Amount

Competitive bids shall be obtained for supplies, materials, and equipment when such cost is above the threshold amount as established in the School Code of 1976, as amended, 380.1274. The Superintendent and/or his/her designee is/are authorized to obtain competitive bids in the following manner:

- A. participation in the State of Michigan's Department of Management and Budget Joint Competitive Bidding Program as authorized by Section 1263, 1984 P.A. 431;

- B. participation in the Regional Educational Media Center Purchasing Program (REMC) for central purchasing of equipment related to media center activities authorized by Section 671, 1976 P.A. 451;
- C. participation through third-party competitive bidding for materials, supplies, and equipment through such programs as the hospital purchasing service (HPS), or the "classrooms for tomorrow" computer equipment procurement program, or other similar programs;

Third-party competitive bidding on behalf of the District shall constitute a competitive bid for purposes of Section 1274 of the School Code of 1976, as amended.

- D. solicitation for bids by letter or by publication in a local newspaper, trade journal or other appropriate publication.

The solicitation must specify the time and place the bids will be opened. If specifications are prepared, these will be made available to all interested bidders. The bids shall be sealed and shall be opened by the Superintendent or his/her designee. All bidders shall be invited to attend the opening of the bids.

The Superintendent and/or his/her designee shall inform the Board of the terms and conditions of the bid(s) and shall recommend which bid(s) should be accepted.

In formulating recommendations, the Superintendent and/or his/her designee may give consideration to the quality of the items to be supplied, their conformity with specifications and suitability to the District, delivery terms, past performance of the bidder and any other factors materials to the transaction.

The Board reserves the right to reject any or all bids, waive irregularities, and accept the bid which, in its opinion, is in the best interest of the District.

Purchases for Supplies, Materials, and Equipment that are equal to or greater than one-half (1/2) the amount designated by the State of Michigan Threshold Amount but does not exceed that amount

- A. Quotations must be obtained from a minimum of three (3) vendors.
- B. Record of quotations is to be submitted to the Purchasing Department for purchase backup.

Competitive Bids on Building Construction, Renovations, and Repair

The Board shall obtain competitive bids on all materials and labor required for the complete construction of a new building or buildings, or additions to, repairs or renovations of existing buildings when the cost is in excess of the threshold amount as indicated in the Michigan School Code of 1976, as amended, 380.1267, except repairs in emergency situations.

The Board shall advertise for bids once in the local newspaper annually designated by the Board for its legal publications. In addition, the Board must post an advertisement for at least two (2) weeks on the Department of Management and Budget website or a designated school organization website.

In order to meet the requirements of Public Act 232 of 2004, the Board will need to include the following information in advertisements for bids:

- A. the date and time bids must be received;
- B. the date, time and place of a public meeting where the Board or designee will open and read aloud the bids received by the due date and time;
- C. state that the Board or designee will not consider or accept a bid received by the Board or designee after the date and time specified for bid submission;
- D. state that the bid shall be accompanied by a sworn and notarized statement disclosing any familial relationship that exists between the owner or any employee of the bidder and any member of the Board or the Superintendent and/or his/her designee;

The Board or designee shall not accept a bid that does not include this sworn and notarized disclosure statement.

Bids shall be opened and read aloud in a public meeting at the time and place advertised for receipt of bids. The Board may reject any or all bids, and readvertise in the same manner provided by law and this policy.

In the interests of economy, fairness, and efficiency in its business dealings, the Board requires that:

- A. items commonly used in the various schools or units thereof, be standardized whenever consistency with educational goals can be maintained;
- B. opportunity be provided to as many responsible suppliers as possible to do business with the District;
- C. a prompt and courteous reception, insofar as conditions permit, be given to all who call on legitimate business matters;
- D. where the requisitioner has recommended a supplier, the Superintendent and/or his/her designee may make alternate suggestions to the requisitioner if, in his/her judgment, better service, delivery, economy, or utility can be achieved by changing the proposed order;
- E. upon the placement of a purchase order, the Superintendent or his/her designee shall commit the expenditure against a specific line item to guard against the creation of liabilities in excess of appropriations.

Bid Protest

A vendor or supplier not awarded an intended bid may wish to file a bid protest within the District. A bid protest must provide such notice and procedures prescribed by the Request for Proposals (RFP) or the individual bid specification package, for resolution. Bid protests must be filed in writing with the Office of the Superintendent within seventy-two (72) hours of the opening of the bids in protest.

Within five (5) days of receipt of the protest, the Superintendent and/or his/her designee shall review the protest as submitted and render a decision regarding the merits of the protest and any impact on the acceptance and rejection of bids submitted. Notice of the filing of a bid protest shall be communicated to the Board and shall be so noted in any subsequent recommendation for the acceptance of bids and awarding of contracts.

Failure to file notice of intent to protest, or failure to file a formal written protest within the time prescribed, shall constitute a waiver of proceedings.

The Superintendent and/or his/her designee may acquire equipment as defined in law by lease, by installment payments, by entering into lease-purchase agreements, or by lease with an option to purchase, provided the contract sets forth the terms of such a purchase.

Revised 1/03

Revised 1/05

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Book	Administrative Guideline Manual
Section	6000 Finances
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6320A - **PURCHASING**

Purchasing - General Provisions

- A. All purchases shall be by purchase order processed through the Accounts Payable Office or by District approved purchasing card.
- B. A verbal financial commitment may be made only for emergencies or when it is impossible or impractical to precede the purchase with a purchase order.
- C. Employees are forbidden to use the name of the District, any discounts provided the District, or any other means for associating a personal purchase with the District. They are to make clear to any District supplier from whom they are purchasing an item that it is a personal purchase by the employee and is not associated with the District. Failure to abide by this provision could lead to disciplinary action.
- D. Ongoing commitments such as service contracts and leases should be renewed annually, in writing, at the renewal date.
- E. Blanket purchase orders for goods or services are valid only for the time period and amount indicated on the purchase order. Extension of the commitment beyond that time and/or amount shall be confirmed by a new purchase order. Blanket purchase orders must be approved by the Budget Manager before they are issued.
- F. Purchases of contracted services shall be negotiated either verbally, by a Request for Proposal, or through the bid process, as determined by the Superintendent or designee.
- G. Any contracted service, other than legal services, for a single transaction, that costs the District more than the state minimum bidding requirement for supplies, materials and equipment, must be approved by the Board of Education. Such purchases and the method for procuring such purchases will be communicated to the Board Finance Committee prior to the solicitation of the service.

H. The Purchasing Coordinator will determine the most appropriate method of obtaining prices for items or groups of items which are not subject to formal bidding procedures.

I. Purchases of supplies, materials, and equipment items costing more than the amount stipulated in Board policy must be obtained through competitive, sealed bids and be approved by the Board.

Purchase Order Procedure

A. The requestor completes the on-line purchase order directly in the accounting system.

B. The budget manager responsible for the purchase shall approve the purchase order on-line.

C. The original copy of the purchase order is sent to the vendor by the purchasing department unless there are specific instructions to the contrary.

Payment of Claims Procedure

A. When delivery is made, the principal/supervisor checks the purchase order to ensure the order has been received correctly and in proper condition.

B. If so, the packing or delivery slip is initialed, and copies are sent, within five (5) working days, to the Accounts Payable Clerk for payment.

C. The Accounts Payable Clerk checks the delivery slip against the purchase order, and if everything is in order, a check is drawn.

D. If the Accounts Payable Clerk finds discrepancies or has questions, s/he shall contact the principal/supervisor.

E. The vendor's invoice is filed with applicable documentation and a copy of the check.

March 1999

June 1999

Revised January 2003



Book	Policy Manual
Section	6000 Finances
Title	NEW SCHOOL CONSTRUCTION, RENOVATION
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Last Revised	June 10, 2019

6321 - **NEW SCHOOL CONSTRUCTION, RENOVATION**

Before commencing construction of any new school building or the major renovation of an existing school building, the Board shall consult on the plans for construction or major renovation regarding school safety issues with the law enforcement agency that is the first responder for the school building at issue. For purposes of this paragraph, school building means any building intended to be used to provide instruction to students and any recreational or athletic structure or field intended to be used by students.

Before beginning construction of a new school building, or an addition, repair or renovation of an existing school building, except emergency repairs, the Board of Education shall obtain competitive bids on all the material and labor required for renovation of an existing school building.

This policy does not apply to buildings, renovations, or repairs costing less than the threshold provided annually by the State of Michigan, or to repair work normally performed by District employees.

The Board shall advertise for the bids required under subsection:

- A. By placing an advertisement for bids at least once in a newspaper of general circulation in the area where the building or addition is to be constructed or where the repair or renovation of an existing building is to take place and by posting an advertisement for bids for at least two (2) weeks on the Department of Technology, Management and Budget website on a page on the website maintained for this purpose or on a website maintained by a school organization and designated by the Department of Management and Budget for this purpose.

- B. By submitting the request for bids for placement on the Michigan Department of Technology, Management and Budget's website for school organizations, including a link to the District's website.
- C. The advertisement for bids shall do all of the following:
1. specify the date and time by which all bids must be received by the Board at a designated location;
 2. state that the Board will not consider or accept a bid received after the date and time specified for bid submission;
 3. identify the time, date, and place of a public meeting at which the Board or its designee will open and read aloud each bid received by the Board by the date and time specified in advertisement;
 4. state that the bid shall be accompanied by a sworn and notarized statement disclosing any familial relationship that exists between the owner or any employee of the bidder and any member of the Board or the Superintendent of the District. A Board shall not accept a bid that does not include this sworn and notarized disclosure statement.
- D. The Board may require each bidder for a contract under this policy, to file with the Board security in an amount not less than 1/20 of the amount of the bid conditioned to secure the District from loss or damage by reason of the withdrawal of the bid or by the failure of the bidder to enter a contract for performance, if the bid is accepted by the Board.
- E. The Board shall not open, consider, or accept a bid that the Board receives after the date and time specified for bid submission in the advertisement for bids as described in subsection C of this policy.
- F. When applicable, at a public meeting identified in the advertisement for bids described in subsection C of this policy, the Board or its designee shall open and read aloud each bid that the Board received at or before the time and date for bid submission specified in the advertisement for bids. The Board may reject any or all bids, and if all bids are rejects, shall re-advertise in the manner required by this policy.



Book	Policy Manual
Section	6000 Finances
Title	PROCUREMENT – FEDERAL GRANTS/FUNDS
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6325 - **PROCUREMENT – FEDERAL GRANTS/FUNDS**

Procurement of all supplies, materials, equipment, and services paid for from Federal funds or District matching funds shall be made in accordance with all applicable Federal, State, and local statutes and/or regulations, the terms and conditions of the Federal grant, Board of Education policies, and administrative procedures.

The Superintendent or designee shall have and use a procurement and contract administration system in accordance with the USDOE requirements (2 C.F.R. 200.317-.326) for the administration and management of Federal grants and Federally-funded programs. The District shall maintain oversight that requires contractors to perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders. Except as otherwise noted, procurement transactions shall conform to the provisions of the District's documented general purchasing Policy 6320 and AG 6320A.

All District employees, officers, and agents who have purchasing authority shall abide by the standards of conduct covering conflicts of interest and governing the actions of its employees, officers, and agents engaged in the selection, award, and administration of contracts as established in Policy 1110, Policy 3110 and Policy 4110 – Conflict of Interest.

The District will avoid acquisition of unnecessary or duplicative items. Additionally, consideration shall be given to consolidating or breaking out procurements to obtain a more economical purchase. And, where appropriate, an analysis shall be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach. These considerations are given as part of the process to determine the allowability of each purchase made with Federal funds.

To foster greater economy and efficiency, the District may enter into State and local intergovernmental agreements where appropriate for procurement or use of common or shared goods and services.

Competition

All procurement transactions for the acquisition of property or services required under a Federal award shall be conducted in a manner that encourages full and open competition and that is in accordance with good administrative practice and sound business judgment. In order to promote objective contractor performance and eliminate unfair competitive advantage, the District shall exclude any contractor that has developed or drafted specifications, requirements, statements of work, or invitations for bids or requests for proposals from competition for such procurements.

Some of the situations considered to be restrictive of competition include, but are not limited to, the following:

- A. unreasonable requirements on firms in order for them to qualify to do business;
- B. unnecessary experience and excessive bonding requirements;
- C. noncompetitive contracts to consultants that are on retainer contracts;
- D. organizational conflicts of interest;
- E. specification of only a "brand name" product instead of allowing for an "*or equal*" product to be offered and describing the performance or other relevant requirements of the procurement; and
- F. any arbitrary action in the procurement process.

Further, the District does not use statutorily or administratively imposed State, local, or tribal geographical preferences in the evaluation of bids or proposals, unless 1) an applicable Federal statute expressly mandates or encourages a geographic preference; or 2) the District is contracting for architectural and engineering services, in which case geographic location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

The District shall require that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to provide maximum open and free competition. The District shall not preclude potential bidders from qualifying during the solicitation period.

Solicitation Language

The District shall require that all solicitations incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description shall not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured and, when necessary, shall set forth those minimum essential characteristics and standards to which it shall conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible.

When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equivalent" description may be used as a means to define the performance or other salient requirements of procurement.

The specific features of the named brand which shall be met by offers shall be clearly stated; and identify all requirements which the offerors shall fulfill and all other factors to be used in evaluating bids or proposals.

The Board will not approve any expenditure for an unauthorized purchase or contract.

Procurement Methods

The District shall utilize the following methods of procurement:

A. Informal Procurement Methods

When the value of the procurement for property or services under a Federal award does not exceed the simplified acquisition threshold, or a lower threshold established by the State, formal procurement methods are not required. The District may use informal procurement methods to expedite the completion of its transactions and minimize the associated administrative burden and cost. The informal methods used for procurement of property or services at or below the simplified acquisition threshold include:

1. Micro-purchases

Procurement by micro-purchase is the acquisition of supplies or services, of which the aggregate dollar amount does not exceed the established amount pursuant to the Office of Management and Budget (OMB) Government-wide Guidance for Grants and Agreements ("Uniform Guidance") at 2 C.F.R. 200.67. To the maximum extent practicable, the District should distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be made without soliciting competitive quotations if the Superintendent or designee considers the price to be reasonable based on research, experience, purchase history or other relevant information and documents are filed accordingly. The District shall maintain evidence of this reasonableness in the records of all purchases made by this method.

2. Small Purchases

Small purchase procedures provide for relatively simple and informal procurement methods for securing services, supplies, and other property. Small purchase procedures require that price or rate quotations shall be obtained from an adequate number of qualified sources when the amount exceeds a micro-purchase but is less than the amount designated by the State of Michigan threshold.

B. Formal Procurement Methods

When the value of the procurement for property or services under a Federal award exceeds the simplified acquisition threshold, or a lower threshold established by the State, formal procurement methods are required. Formal procurement methods require following documented procedures. Formal procurement methods also require public advertising unless a non-competitive procurement method can be used in accordance with the standards on competition in C.F.R. 200.319 or non-competitive procurement. The formal methods of procurement are:

1. Sealed Bids

Sealed, competitive bids shall be obtained when the purchase of, and contract for, single items of supplies, materials, or equipment which amounts to the amount allowed by Michigan statute and when the Board determines to build, repair, enlarge, improve, or demolish a school building/facility the cost of which will exceed the amount allowed by Michigan statute.

In order for sealed bidding to be feasible, the following conditions shall be present:

- a. complete, adequate, and realistic specification or purchase description is available;
- b. two (2) or more responsible bidders are willing and able to compete effectively for the business; and
- c. the procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

When sealed bids are used, the following requirements apply:

- a. bids shall be solicited in accordance with the provisions of State law and Policy 6320. Bids shall be solicited from an adequate number of qualified suppliers, providing sufficient response time prior to the date set for the opening of bids. The invitation to bid shall be publicly advertised;
- b. The invitation for bids will include product/contract specifications and pertinent attachments and shall define the items and/or services required in order for the bidder to properly respond;
- c. all bids will be opened at the time and place prescribed in the invitation for bids; bids will be opened publicly;
- d. contracts shall be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and
- e. the Board reserves the right to reject any or all bids for sound documented reason.

2. Proposals

Procurement by proposal is a method in which either a fixed price or cost reimbursement type contract is awarded. Proposals are generally used when conditions are not appropriate for the use of sealed bids or in the case of a recognized exception to the sealed bid method.

If this method is used, the following requirements apply:

- a. requests for proposals shall be publicized and identify all evaluation factors and their relative importance. Any response to the publicized requests for proposals shall be considered to the maximum extent practical;
- b. proposals shall be solicited from an adequate number of sources;
- c. the District shall use its written method for conducting technical evaluations of the proposals received and for selecting recipients; and
- d. contracts shall be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered.

The District may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services through A/E that firms are a potential source to perform the proposed effort.

3. Noncompetitive Procurement

Procurement by noncompetitive proposals allows for solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply:

- a. micro-purchases;
- b. the item is available only from a single source;
- c. the public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;
- d. the Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the District; and/or

e. after solicitation of a number of sources, competition is determined to be inadequate.

Domestic Preference for Procurement

As appropriate and to the extent consistent with law, the District shall, to the extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States. Such requirements shall be included in all subawards including all contracts and purchase orders for work or products under the Federal award.

Contract/Price Analysis

The District shall perform a cost or price analysis in connection with every procurement action in excess of the established amount pursuant to the Office of Management and Budget (OMB) Government-wide Guidance for Grants and Agreements ("Uniform Guidance") at 2 C.F.R. 200.88, including contract modifications. A cost analysis generally means evaluating the separate cost elements that make up the total price, while a price analysis means evaluating the total price, without looking at the individual cost elements.

The method and degree of analysis is dependent on the facts surrounding the particular procurement situation; however, the District shall come to an independent estimate prior to receiving bids or proposals.

When performing a cost analysis, the District shall negotiate profit as a separate element of the price. To establish a fair and reasonable profit, consideration is given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

Time and Materials Contracts

The District uses a time and materials type contract only 1) after a determination that no other contract is suitable; and 2) if the contract includes a ceiling price that the contractor exceeds at its own risk. Time and materials type contract means a contract whose cost to the District is the sum of the actual costs of materials, and direct labor hours charged at fixed hourly rates that reflect wages, general and administrative expenses, and profit.

Since this formula generates an open-ended contract price, a time-and-materials contract provides no positive profit incentive to the contractor for cost control or labor efficiency. Therefore, the District sets a ceiling price for each contract that the contractor exceeds at its own risk. Further, the District shall assert a high degree of oversight in order to obtain reasonable assurance that the contractor is using efficient methods and effective cost controls.

Suspension and Debarment

The District will award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of the proposed procurement. All purchasing decisions shall be made in the best interests of the District and shall seek to obtain the maximum value for each dollar expended. When making a purchasing decision, the District shall consider such factors as 1) contractor integrity; 2) compliance with public policy; 3) record of past performance; and 4) financial and technical resources.

The Superintendent or designee shall have the authority to suspend or debar a person/ corporation, for cause, from consideration or award of further contracts. The District is subject to and shall abide by the non-procurement debarment and suspension regulations implementing Executive Orders 12549 and 12689, 2 C.F.R. Part 180.

Suspension is an action taken by the District that immediately prohibits a person from participating in covered transactions and transactions covered under the Federal Acquisition Regulation (48 C.F.R. chapter 1) for a temporary period, pending completion of an agency investigation and any judicial or administrative proceedings that may ensue. A person so excluded is suspended. (2 C.F.R. Part 180 Subpart G)

Debarment is an action taken by the Superintendent or designee to exclude a person from participating in covered transactions and transactions covered under the Federal Acquisition Regulation (48 C.F.R. chapter 1). A person so excluded is debarred. (2 C.F.R. Part 180 Subpart H)

The District shall not subcontract with or award sub-grants to any person or company who is debarred or suspended. For contracts over \$25,000, the District shall confirm that the vendor is not debarred or suspended by either checking the Federal government's System for Award Management, which maintains a list of such debarred or suspended vendors at www.sam.gov; collecting a certification from the vendor; or adding a clause or condition to the covered transaction with that vendor. (2 C.F.R. Part 180 Subpart C)

Bid Protest

The District maintains the following protest procedures to handle and resolve disputes relating to procurements and, in all instances, discloses information regarding the protest to the awarding agency.

A bidder who wishes to file a bid protest shall file such notice and follow procedures prescribed by the Request For Proposals (RFPs) or the individual bid specifications package, for resolution. Bid protests shall be filed in writing with the Superintendent or designee within seventy-two (72) hours of the opening of the bids in protest.

Within five (5) days of receipt of a protest, the Superintendent or designee shall review the protest as submitted and render a decision regarding the merits of the protest and any impact on the acceptance and rejection of bids submitted. Notice of the filing of a bid protest shall be communicated to the Board and shall be so noted in any subsequent recommendation for the acceptance of bids and awarding of contracts.

Failure to file a notice of intent to protest, or failure to file a formal written protest within the time prescribed, shall constitute a waiver of proceedings.

Maintenance of Procurement Records

The District shall maintain records sufficient to detail the history of all procurements. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price (including a cost or price analysis).

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Book	Policy Manual
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6450 - **LOCAL PURCHASING**

The Board of Education recognizes its position as a major purchaser in this community, and while it is the intention of the Board to purchase materials and supplies of quality at the lowest possible cost through widespread competition, if all other considerations are equal, the Board prefers to purchase within the District from established local merchants.

Goods and services will be purchased locally whenever the following factors are seen as being equal between local and nonlocal vendors or whenever local vendors excel in said factors provided that all statutes pertaining to public purchasing are duly observed:

- A. quality of product or service
- B. suitability of product or service
- C. price
- D. conformance of specifications
- E. convenience of delivery
- F. general reputation of business firm
- G. service to School District



Book	Policy Manual
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Title	PURCHASING CARDS
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6424 - **PURCHASING CARDS**

The Board recognizes that bank purchasing cards offer a valuable alternative to existing procurement processes and provide a convenient, efficient method of purchasing. Purchasing cards shall not be used to circumvent the general purchasing procedures required by State law and Board policy.

All approved cardholders must abide by purchasing card procedures and regulations set forth in this policy and relevant administrative guidelines. All transactions must be made by the individual to whom the card is issued.

Purchasing card banks shall not be provided with individual cardholder information (e.g., credit records or social security numbers) other than the individual cardholder's work address.

The Executive Director of Finance and Operations and/or his/her designee shall conduct independent regular reviews of each cardholder's activity to verify that the purchasing card is being used in accordance with this policy and administrative guidelines. Prices for commonly priced items should be periodically verified to prevent schemes of purposeful price inflation.

Cardholders must use common sense and good judgment when using school resources. This policy and related administrative guidelines cannot cover every issue, exception, or contingency that may arise during the cardholder's use of the purchasing card.

Cardholders will immediately surrender their cards upon request of the Purchasing Coordinator and shall surrender their cards upon separation from employment. Cardholders are required to take reasonable prudent measures to protect the use and custody of the card and shall immediately notify the Purchasing Coordinator if the card is lost or stolen.

The purchasing card may never be used to purchase alcohol or personal items or services. The personal gain of credit card rewards such as bonus points, frequent flyer miles, or any other affinity program reward by the employee/cardholder is prohibited under any circumstances.

Misuse of the purchasing card may result in disciplinary action.

