

PCSD #6



Park County School District #6
Cody, Wyoming

PURCHASING PROCEDURES MANUAL

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INDEX

PURCHASING PROCEDURES MANUAL	4
INTRODUCTION	4
UNIFORM PURCHASING STANDARDS	5
PURPOSE	5
PURCHASING - POLICY #DJ	6
METHODS OF PURCHASING	8
PURCHASE ORDERS	9
LOCAL PURCHASES	10
IMPREST FUND	10
STUDENT ACTIVITIES	11
SALES TAX	11
MEALS & TIPS	11
EMPLOYEE RECOGNITION GIFTS	11
PENALTY OF PERJURY STATEMENT	11
CREDIT CARD USE – POLICY #DJB	12
BIDDING PROCEDURES – POLICY #DJE	16
QUOTES	17
EVALUATION / AWARD OF BIDS AND QUOTES	18
PROFESSIONAL SERVICE AGREEMENTS	19
PREFERENCE – WYOMING IN-STATE AND / OR LOCAL	19

PURCHASING PROCEDURES MANUAL

This manual has been prepared to assist personnel and stakeholders of Park County School District #6 (PCSD#6) to understand the purchasing policies and procedures of the district. The purpose of this manual is to provide a foundation for effective and consistent purchasing practices.

It is the intent of PCSD#6 to make all purchases in the best interest of the school district; to ensure that PCSD#6 complies with all state statutes; to utilize taxpayer dollars in the best possible way; and to assure that proper and ethical business purchasing practices are followed.

All individuals responsible for expenditure of PCSD#6 dollars shall be thoroughly familiar with the policies and procedures outlined in this manual and each individual is responsible for following district policies, procedures, and applicable state statutes relative to purchasing.

INTRODUCTION

Each building administrator/department head or assigned designee should review each purchase carefully to ensure it fits within the framework of the district's educational philosophy and goals as well as operating budget. Purchasing decisions should be based on the best interest of PCSD#6 rather than solely on the basis of price.

To achieve this overall objective, all employees must adhere to the responsibilities, authorities and controls set forth in this manual and to all related district policies and procedures.

The Business Office's primary responsibility in purchasing is to facilitate the procurement of materials, supplies and services. These tasks include but are not limited to vendor master set-up, process purchase orders, reconcile invoice quantity and price against the purchase order, manage vendor terms for payment, reconcile credit card monthly statement, pay monthly routine bills, and process reimbursements. Regular check runs are performed bi-weekly with approval from board treasurer to release checks. The District vouchers for payment are approved by the board at the regular monthly board meeting. The District operates with a decentralized purchasing structure. Each site or department procures goods and services within their operating budget. The Business Office of PCSD#6 is located at 919 Cody Ave, Cody, WY 82414. Office hours are 7:30 am – 4:00 pm Monday through Friday. The office telephone number is (307) 587-4283.

PURCHASING STANDARDS

The purchasing procedures of PCSD#6 shall be based on uniform standards of purchasing ethics and practices. All PCSD#6 employees engaged in purchasing activities shall support established policies and procedures.

Accordingly, such standards should:

1. Abide by all applicable governmental laws, ordinances, policies, and regulations.
2. Ensure that fairness and equity between PCSD#6 and vendors are fundamental for sound and desirable business transactions and are best achieved through mutual trust, respect, and cooperation.
3. Achieve maximum value in the purchase by giving due consideration to quality, service, reliability, and price.
4. Establish multiple sources of supply whenever practical.
5. Give equal opportunity to all qualified suppliers doing business with PCSD#6.
6. Promote good community relations and encourage and support business in the local area whenever practical and economical to do so.
7. Be responsive to the needs of the school district.
8. Promote awareness of the purchasing function with PCSD#6 personnel.
9. Result in efficient purchasing.
10. Result in purchasing functions that are professional, ethical, and legal.

PURPOSE

The purpose of this guide is to clearly articulate the policy and procedures to be used in dealing with the expenditure of school district funds. The outline provided on the following pages is to be followed at all schools and district sites.

PURCHASING– PCSD#6 Policy # DJ

The district's purchasing program shall serve the interests of the school district and the betterment of its education program by providing the necessary supplies, equipment and services.

The Board declares its intention to purchase competitively without prejudice and to seek maximum educational value for every dollar expended.

The Superintendent or his designee will serve as the district's purchasing agent. He/she shall be responsible for developing and administering the purchasing program of the district. The purchasing policies of the district will comply with all applicable laws and regulations of the state as well as follow Board policies. Reference DJ-R-1.

1. The Business Manager is to act as the purchasing agent of the school district.
The Business Manager has the responsibility to oversee the procurement of materials, supplies, equipment, and services for the district.

Expenditures will fit within the district's annual operating budget, which the Board sees as the district's controlled spending plan.

1. Building administrators / department heads or their designees shall monitor their budgets to ensure that all proposed purchases fall within the educational goals of the district as well as adequate budget limits.
2. Budget transfers are allowable within a budget area, such as from instructional supplies to instructional purchased services, provided there is adequate budget overall. See the business office or go online for budget transfer form. Payroll related line items, even if specific to a certain building, are not acceptable transfers. In very unique and limited circumstances, the business office may override this rule.
3. On occasion, the Board may approve expenditures over and above previously adopted budget limits. In such case(s), a budget amendment(s) shall be approved by the Board to amend current adopted budget following any and all state rules and regulations.
4. Purchase orders will be accepted through March 31 for expenditures out of the current year's budget except for normal monthly expenses.
5. Periodically the facilities director will hold a surplus sale of goods and equipment.

The purchasing agent is authorized to issue purchase orders without prior approval of the Board when formal bidding procedures are not required by law and when budget appropriations are adequate to cover the obligations.

1. Predominantly purchases made on district funds shall be made through the business office on official purchase orders from requisitions generated at the building or department level. A PO will be issued for purchases over \$500.00.
2. All items requisitioned shall be approved by the appropriate person at the appropriate level (building administrator or department head), and
3. Coded with accurate budget code prior to the creation of purchase order.
4. All requisitions of \$500 or more, shall require additional approval(s) per the following thresholds:
 - a. \$500 or more requires Business Manager approval, and
 - b. \$5,000 or more requires Superintendent approval.

The Superintendent shall secure approval of the Board of Trustees for major purchases of equipment which amount to considerable expenditure by the district.

1. The following thresholds for purchase(s) of equipment which require Board of Trustee approval (in addition to approvals above):
 - a. School District Funds and Federal funds more than \$25,000 but under \$50,000 requires Board approval based on competitive bids or quotes.
 - b. School District Funds and Federal funds \$50,000 and over requires Board approval following formal bidding process.See DJ-R-2 for additional information on federal procurement.

Competitive bids or quotations (quotes) shall be solicited in connection with purchasing whenever it is required by law. Contracts shall be awarded to the lowest responsible bidder complying with specifications and with other stipulated bidding conditions.

1. For purposes of this manual, 'bids' generally refers to acquiring those items falling under the state's formal bidding procedures, \$50,000 or more. 'Quotes' are for those items that do not require such, between \$25,000- \$50,000.
2. Every attempt shall be made to obtain 3 competitive quotes whenever possible.
 - a. Quotes should be written and
 - b. Kept on file for one year by the site or department and a copy provided to the business office.
 - c. Quotes should be obtained for:
 - i. For any purchase of supplies, materials other than textbooks, not meeting the state's formal bidding process threshold of \$50,000 or more.
 - d. In a situation where every attempt has been made to obtain more than

one quote has been unsuccessful, a note stating such should be kept in file.

- e. When the district purchases from a board of cooperative educational services (BOCES) falling under the state's bidding requirement which have been met, the district is not deemed as having met the requirement.

Preference in purchasing shall be given to in-district, county, or state vendors respectively, provided:

1. Their prices are equal to or better than other vendors,
2. They meet the specifications of the district, and
3. The quality of the purchases being at least equal.

The quantity of items purchased shall depend on the necessity of the items, storage space, availability and economy of volume purchased.

The purchasing agent or designee shall make every effort to receive full value for the dollar spent. The purchasing function shall be to buy the required products which, during the product's period of usefulness, will be the most efficient and economical.

Petty cash fund can be used for the payment of properly itemized bills of nominal amounts and under conditions calling for immediate payment.

Whenever possible, all supplies shall be ordered for late summer delivery to keep purchasing during the year to a minimum.

All contracts which require public advertising and competitive bidding shall be awarded by the Board. Recommendations for the award of these contracts shall be submitted to the Board by the Superintendent. (See Bidding Procedures for further details.)

METHODS OF PURCHASING

PCSD#6 recognizes the following methods of purchasing to procure goods and services:

- Purchase orders
- Local vouchers
- Credit card use

- Imprest funds
- Petty cash

PURCHASE ORDERS

A purchase order is the official PCSD#6 document to procure supplies, equipment, and services that must be ordered. It is the legal document that binds the district and notifies the vendor to ship the order and that payment is assured by the district. Blanket purchase orders may be approved for routine purchases for facilities and transportation. Federal purchases over \$500.00 must be on a purchase order or blanket purchase order for school nutrition department. DJ-R-2 for detailed federal procurement.

A purchase order is considered a valid agreement of PCSD#6 to procure goods and / or services if the purchase order contains all of the following information:

- A valid vendor;
- A brief description of the goods and / or services being procured;
- Accurate cost (quantity and extended price);
- Appropriate budget code;
- Relevant general conditions of purchasing, if any;
- Appropriate signature(s) from the Superintendent, Business Manager, or authorized department head; and
- On a unique numbered district purchase order generated by the Business office.

Procedures

A requisition should be initiated by the site or department, the instructor, or other authorized personnel requesting procurement. Vendor name and address, description of the item(s) to be procured, quantity, price per item, shipping or freight of items as well as any shipping instructions, and budget account code need to be included.

Building administrator or department head approval is required on all requisitions. Second level approvals by other department heads may be necessary if the requisition affects grants, special education, technology, maintenance, transportation, or school foods.

Approval of the Business Manager is required if the requisition is \$500 or more and Superintendent approval is required on all purchases \$5,000 or more.

The business office will generate the purchase order and place the order.

Permission has been granted to enter requisitions after the fact for routine bills. Common examples include regular monthly bills for utilities, legal counsel, copier & postage machine, bottled water or similar vendors, legally required publications in the newspaper, billed consultants, renewals of subscriptions or membership dues, repairs & parts for facilities and transportation operations. These requisitions will be submitted in a timely manner.

Any purchases made outside of the approved process will be the responsibility of the individual making the order and will not be the responsibility of the school district.

LOCAL PURCHASES

Occasionally, a local purchase can be accomplished with a pre-approved voucher, which is a PCSD#6 document to be used for purchases in or around Cody for items that do not have to be ordered or for items when an invoice has already been received as is common in the maintenance and transportation areas. The district does not intend that the convenience of using a district voucher should circumvent purchasing policies already in place.

Approval should be secured from the building administrator or department head prior to a local purchase. Additional information required for a complete voucher include vendor name and address, date, brief description of item(s) purchased, total amount, appropriate budget code and approval. Any pertinent documentation must also be included as well as invoice(s). Completed voucher and documentation should be remitted to the business office timely.

Certain departments, such as maintenance and transportation, procure supplies from local businesses on a daily basis on school account(s). Department head approval should be obtained prior to procurement whenever possible. Invoices complete with department head approval and account code shall be turned in the business office timely.

IMPREST FUND

The imprest fund is a weekly check run intended to reimburse district staff, substitutes, and trustees for travel expense(s) such as per diem and / or mileage. All other reimbursement(s) for staff shall be accomplished on regular accounts payable check runs bi-weekly.

Complete a voucher with travel claim and any necessary documentation to reflect dates of travel, miles, destination, school purpose of travel, along with appropriate approval.

Submit by close of business (4:00 pm) on Wednesday for a Thursday check.

STUDENT ACTIVITIES

Activities and clubs – Purchases made from the school activity funds (clubs) shall require pre-authorization of the school administrator. No individual is to order anything for any group using the name of the school district without prior permission of the administrator or his designee. Any such instances will be the responsibility of the individual making the order and will not be the responsibility of the school district.

SALES TAX

Merchants are usually required by taxing authorities to include sales tax when goods and services are purchased. Purchases of items by public schools for their own use are generally exempt from sales tax. The exemption applies to the public schools, not to the individual. It is the cardholder's responsibility to notify the merchant that PCSD#6 is tax exempt. The tax-exempt number is available from the district business office. Do not distribute this number to anyone else.

MEALS & TIPS

The District periodically purchases meals from the general fund for onsite events including staff meetings, professional development trainings, school conferences, etc. The expectation is meals and tips will be kept at a reasonable level. Tips should not exceed 20%. Please reference travel guidelines for staff travel reimbursement per diem.

EMPLOYEE RECOGNITION GIFTS

Employees may be recognized with a prize or award that is of nominal value, \$25 or less, which is provided infrequently. The prize or award must meet the IRS rules as a de minimis benefit IRS Publication 15-B in order for it to be excluded from the employee's wages. The prize or award cannot be cash or cash equivalent, such as a savings bond, a gift certificate, or a business cash card or other item that can be converted to cash. A gift certificate at a local business must have a restricted item/merchandise choice stipulation attached in order for the gift to be a non-cash equivalent item.

PENALTY OF PERJURY STATEMENT

The penalty of perjury statement is required by statute W.S. 16-4-108. The expenditure may be authorized by the governing body when the claim is certified under penalty of perjury by the vendor or by an authorized person employed by the municipality receiving the items or for whom the services were rendered.

CREDIT CARD USE- PCSD#6 Policy # DJB

The Board of Trustees (the Board) of PCSD#6 recognizes that there are times district personnel, in the performance of school district business, expend funds when a purchase order is neither practical nor possible. This includes personnel who travel for school business, particularly when traveling out of state.

PCSD#6 further acknowledges that online purchasing and e-commerce are ever- expanding methods of procuring school materials and supplies, generating discounts and free or reduced shipping, which ultimately saves the school district money. Also, certain district staff, in performing the normal duties of their positions, which may span off hours or weekend hours, may need immediate access to supplies and repairs such as in the case of equipment failures and weather- or safety-related circumstances.

For these reasons, the Board authorizes the use of district credit cards for legitimate school district expenditures. It shall be the responsibility of the authorized cardholder to assure that all purchases on district credit cards, regardless of the source of funds, are accomplished for the benefit of the district, are necessary, and utilize the most cost effective arrangements.

The district does not intend that the convenience of using district credit cards should circumvent purchasing policies currently in place. PCSD#6 has purchasing policies and procedures in place that require pre-approval prior to placing an order which ensures both proper authorization as well as budget appropriation. Cardholders must further ensure that all credit card purchases adhere to district educational policies and goals as well as budget limits.

Program Restrictions. Credit limits may vary from card to card but will not exceed \$15,000 each. Credit card users should be aware of the limit of the specific card they have been issued and accept responsibility for staying within it. The Superintendent may, at his discretion, approve a change in the limit of a credit card, whether increase or decrease. Requests must be submitted to Superintendent in writing. Any requests to increase a card limit above \$15,000 will require Board approval.

Requests for additional cards will require Board approval.

The Business Office is instructed to maintain a current list of district credit cards, cardholders, and limits attributed to each.

Possession / Security of Credit Cards. Each cardholder will be responsible for any card(s) in his/her name. When not in your physical possession, district credit cards should be secured in a safe location. A district credit card may be checked out to other staff members becoming an authorized credit card user in certain circumstances such as for supply purchases or school travel. A log reflecting:

- the date checked out,
- person taking possession of the card,
- the date returned,
- the business purpose of the credit card use,
- budget/account code, and
- an estimate of the anticipated expenditures, and
- building administrator / department head signature approving use.

Acceptable District Credit Card Purchases. Any purchase using the district credit card must fall within PCSD#6 expenditure policies, procedures and practices, and Wyoming Statute. Purchases must also meet district educational goals. Purchases not meeting these requirements will be deemed the personal responsibility of credit cardholder.

The following provides an example of purchases that may be appropriate with district credit card(s):

- Approved supplies for your program when a purchase order is not practical or possible
- Conference or seminar registrations for approved travel
- Travel expenses such as airline tickets for approved travel
- Textbooks when a purchase order is not practical or possible
- Hardware store purchases when necessary such as in an emergency and a purchase order is not practical or possible
- Fuel for district owned vehicles
- Miscellaneous items as necessary and approved.

Unacceptable District Credit Card Purchases. The following defines instances where the district credit card is not an appropriate choice:

- Personal purchases (i.e. including spouse/family costs for attending a conference such as higher room costs, meals, etc.)
- Alcoholic beverages or tobacco
- Lottery tickets
- Cash advances or ATM withdrawals

- Gift certificates
- Fuel for personal vehicles

This list is not intended to be all-inclusive. If you have specific questions, please call the district business office for assistance.

Documentation & Reconciliation. Accurate record keeping is essential to the program. It shall be the responsibility of each cardholder to document every transaction on his/her account each month. Original receipts and support for every purchase on each district credit card issued per cardholder must be tendered to the business office within 30 days complete with cardholder or budget supervisor approval and appropriate account code. This expectation holds for online orders as well.

All documentation needs to be filed in such a timely manner as to allow prompt payment of the account.

Undocumented purchases become cardholder's personal responsibility. In the event of a missing receipt and every attempt has been made by the cardholder to secure such documentation, an affidavit of appropriate purchase can be submitted to the business office for consideration of release of personal responsibility.

The business office will review credit card activity for compliance and will report any discrepancies to the Superintendent and Board Treasurer.

Misuse of Card. Misuse of the district credit card will not be tolerated. Misuse

of a district credit card includes but is not limited to the following:

- Using it for personal purchases
- Purchase of unauthorized items
- Use of credit card by someone other than the card holder or someone without proper approval
- Fraudulent or inaccurate record keeping
- Diverting legitimate school purchases to personal use.

In the case of misuse of a district credit card, the individual will be responsible for any unauthorized transactions.

Misuse of district credit card can result in revocation of credit card privileges and disciplinary action including termination of employee.

Lost or Stolen District Credit Card. PCSD#6 expects each cardholder to be responsible and exercise due care of district credit card(s). Cardholder should be able to account for district credit card(s) at all times. District credit card should be held in a secured location when not in use.

If your district credit card is lost or stolen, contact the district business office immediately. If credit card is lost or stolen on a weekend, call the Business Manager. Your district credit card will be deactivated immediately. Prompt action in these circumstances is very important to reduce district liability for fraudulent charges. If a card has been reported lost or stolen and is later presented, a merchant will decline it.

BIDDING PROCEDURES– PCSD#6 Policy # DJE

Competitive bidding requirements for Wyoming school districts are set forth in the statutes at W.S. 21-3-110(a)(viii). These requirements should be followed when acquiring fixed assets or when purchasing insurance, supplies or materials other than textbooks. It has been generally interpreted that these requirements do not apply to the procurement of professional services or to leases.

In an attempt to assure that all interested persons who desire to do business with this district are afforded an equal opportunity to do so, the district shall obtain **competitive quotes** when

- Any purchase of insurance, supplies, or materials other than textbooks costing \$25,000 or more and less than \$50,000 is contemplated unless precluded by other regulation or Wyoming Statutes. Federal Funds more than \$25,000 but under \$50,000, see DJ-R-2 for detailed federal procurement.
- When items of equipment costing \$25,000 or more and less than \$50,000, the administration will receive competitive quotes and determine the quote to be accepted based on the needs of the district. Federal Funds more than \$25,000 but under \$50,000, see DJ-R-2 for detailed federal procurement.

When acquisitions of \$50,000 or more are contemplated, a **formal call for bids** shall be published in the newspaper of general circulation in the state at least once each week for two consecutive weeks and state website.

- Any school building is to be built or any repairs, additions, or improvements costing \$50,000 or more are to be made for any school building, facility or other district property, the Board shall obtain competitive bids and publish a call for bids. See DJ-R-3 for detailed construction contract procurement.
- No contract shall be divided for the purpose of avoiding this provision.
- Prior to requesting any bid of \$50,000 or more, Board approval must be obtained.
- Board approval shall be sought for purchase through a sole source vendor.
- Items for which bids must be obtained may be described in the public call for bids by stating general requirements and making detailed specifications available to prospective bidders at the administrative offices.
 - o Bids shall be advertised in the state newspaper for at least once each week for two consecutive weeks and state website.
 - o Bid specifications can be obtained from the district offices.
- No bids shall be considered which are received after the time mentioned.
- Any bid received after the scheduled time shall be returned to the bidder unopened.

- The district may require up to thirty (30) days from receipt of the bid for acceptance of the bid(s).
- All bids will be submitted in sealed envelopes and once received will remain unopened until opened in public by the Business Manager or designee on the specified date and time and a determination will be made as to who is the successful bidder. Once a bid is opened and recorded, vendors will not be permitted to modify their bids.
- A recommendation will be made to the Board at its next regular or special meeting. The Board may approve the bid recommendation, but reserves the right to take the bid under advisement pending further review.
- The Board will determine, on a case-by-case basis at the time the bid proposal is reviewed, whether the bids are to be accompanied by a bid security and the amount, whether a performance bond must be posted and, if so, the amount, whether the contractor must provide insurance, and if so, the type and amount as well as the amount of liquidated damages if any which are to be provided for in the final contract documents.
- A bid file shall be maintained by the site or department and a copy provided to the business office for every district bid. The bid documents shall be kept on file for a minimum of 5 years.
 - o Items that should be included
 - Advertisement for bid
 - RFP or bid document
 - Bid tabulation sheet
 - Bids received
 - Board recommendation
 - Contract, if any
 - Change orders, if any

The district shall reserve the right to reject any or all bids and to waive irregularities and informalities in the bidding or to accept any bid which in its sole and absolute judgment, under the circumstance, best serves the district's interest.

Where applicable, preference will be given to Wyoming contractors as provided in Wyoming Statute 9-8-301 (1977) et seq.

QUOTES

Written competitive bids or quotes are required for all purchases of supplies, materials, and equipment requiring an estimated expenditure of \$25,000 or more and less than \$50,000.

A recommendation will be made to the Board of Trustees on the quote to be accepted based on the needs of the district.

Every reasonable effort should be made to generate at least three (3) quotes. In the case where three quotes cannot be obtained, it should be noted in the recommendation to the Board of Trustees. Copies of quotes and documentation shall be kept on file a minimum of one year by the site or department and a copy provided to the business office.

When a purchase order is issued as a result of a bid or quotation, the bidder is considered legally bound to the price(s) and all terms as stated in the bid or quotation documents. The successful bidder should not be allowed to raise quoted price(s) or change the terms unless approved by the Superintendent or his designee. The bidder must submit a letter stating the reason(s) for changing the bid.

All requests for bids and proposals shall contain the words “preference is hereby given to materials, supplies, equipment, agricultural products, machinery and provisions produced, manufactured, supplied or grown in Wyoming, quality being equal to articles offered by the competitors outside the state”. (W.S. 16-6-106)

Purchases of supplies, material, equipment, machinery and provisions supplied by residents of the State of Wyoming shall be awarded the item if the bid is not more than five percent (5%) higher than that of the lowest responsible nonresident bidder. Preference shall not be granted for articles of inferior quality. (W.S. 16-6-105)

EVALUATION / AWARD OF BIDS AND QUOTES

Once bids and quotes are received, designated personnel must evaluate and determine which bid or quote will be recommended for award using the criteria listed below. Bids will ordinarily be awarded to the lowest responsible bidder, taking into consideration:

- Ability, capacity and skill of the bidder to perform the contract or provide the required service;
- Whether the bidder can perform the contract or provide the service promptly and within the time specified without delay or interference;
- The character, integrity, reputation, judgment, experience and efficiency of the bidder;
- The quality of performance of previous contracts or services;
- The previous and existing compliance by the bidder with laws and ordinances relating to the contract;
- The equipment and facilities available to the bidder to perform the contract or provide the service;

- The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service;
- The quality, availability and adaptability of the supplies, materials, equipment or services to the particular use required;
- The ability of the bidder to provide future maintenance, parts and service;
- The amount and conditions, if any, of the bid.

PCSD#6 reserves the right to base its decisions on the best interests of the school district and to accept or reject, in whole or in part, any or all bids.

When a bid has to be re-bid, all competing bidders must be given an equitable opportunity to rebid. Rebidding should be restricted to an absolute minimum.

PROFESSIONAL SERVICE AGREEMENTS

Procurement of professional services from architects, engineers and surveyors If professional services in an amount exceeding \$25,000.00 are required, the District shall notify all qualified architects, engineers and land surveyors of record who have submitted an annual statement of qualifications and performance data. In addition, if professional services in an amount exceeding \$50,000.00 are required, the District shall give notice in a newspaper of general circulation in the state at least once each week for two consecutive weeks prior to initiation of selection procedures in accordance with W.S. 9-2-1031. See DJ-R-3 for detailed outline of requirements specific to architects, engineers and surveyors.

Competitive bidding of professional services (legal services, accounting services, auditing services, etc) is not required by Wyoming statutes. Consultants may be selected to submit proposals based on their knowledge of the project in question and their ability to perform the service(s) needed.

The proposal submitted by the consultant should include: profiles of the vendors; evidence of the firm's ability to perform the work; personnel who are qualified to perform services on the project; the firm's principles, equipment, and facilities; references; summary on the understanding of the project; education; experience; expertise of the firm; the firm's approach to planning, organization and management of the project; present workload; and financial stability.

PREFERENCE - WYOMING IN-STATE AND/OR LOCAL

In accordance with state law, the District will show preference to in-state bidders whenever required and may show preference when desirable. W.S. 16-6-101 through 16-6-107.

