

SUBJECT: PROCUREMENT OF GOODS AND SERVICES**Purpose**

Goods and services which are not required by law to be procured through competitive bidding must be procured in a manner so as to assure the prudent and economical use of public funds, in the best interest of the taxpayers to facilitate the acquisition of goods and services of maximum quality at the lowest possible cost under the circumstances, and to guard against favoritism, improvidence, extravagance, fraud, and corruption. To further these objectives, the District has adopted internal policies and procedures governing all procurements of goods and services which are not required to be made pursuant to the competitive bidding requirements of General Municipal Law Section 103 or any other general, special, or local law.

Responsibilities

The District's purchasing activities will be part of the responsibilities of the Business Office, under the general supervision of the Purchasing Agent, who has been designated by the Board.

***Guidelines for Purchasing Services, Supplies, and Equipment when Competitive Bidding is Not Required by Law**

<u>Estimated Amount of Purchase</u>	<u>Procedure/Requirements</u>	<u>Responsibility</u>
Less than \$1,000	At least two catalog or price sheet comparisons.	Obtained by the originator. The originator will indicate on the purchase requisition form the basis for the determination that the suggested vendor be used.
\$1,001 - \$5,000	Three informal written quotations (internal form).	Obtained by the originator. The originator will indicate on the purchase requisition form the basis for the determination that the suggested vendor be used.
\$5,001 - \$20,000	Three formal requests for proposals or quotations issued by the District.	Obtained by the School Business Official.

****District must customize***

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SUBJECT: PROCUREMENT OF GOODS AND SERVICES (Cont'd.)***Guidelines for Public Works Projects when Competitive Bidding is Not Required by Law**

<u>Estimated Amount of Purchase</u>	<u>Procedure/Requirements</u>	<u>Responsibility</u>
Less than \$2,000	No quotation required.	Originator must substantiate the need and choice of contractor.
\$2,001 - \$10,000	Three informal written quotations (internal form).	Obtained by the School Business Official.
\$10,001 - \$35,000	Three formal requests for proposals or quotations issued by the District.	Obtained by the School Business Official.

Documentation

The District will ensure that each purchase and/or procurement is adequately documented. This documentation will include, but not be limited to, information sufficient to demonstrate that the purchase or procurement was made in compliance with the guidelines set forth above, and the basis for the determination that competitive bidding is not required.

In the event a contract is awarded to a vendor other than the lowest responsible dollar offeror, the District will retain documentation setting forth the reasons this award furthers the purposes of this regulation.

Sealed Proposals

In the event they are required, sealed proposals will be received, time-stamped, recorded, and kept in a safe place until the appointed day and time when they are publicly opened and read.

Proposals will be checked and analyzed for compliance with specifications and law. The District reserves the right to reject any and all proposals for valid cause, or to waive technical defects, qualifications, irregularities, and omissions if, in its judgment, this action serves the best interests of the District. Also reserved is the right to reject proposals and to purchase items on state contract if those items can be obtained on the same terms, conditions, specifications, and at a lower price.

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SUBJECT: PROCUREMENT OF GOODS AND SERVICES (Cont'd.)**Purchase Orders**

The Purchasing Agent will be authorized to issue pre-numbered purchase orders for all goods and services where a budgetary appropriation has been made. Purchase orders will be issued after the award of the contract, will refer to the relevant specifications, and will bear the price or prices indicated by the vendor.

Blanket purchase orders issued yearly will be used where appropriate.

Purchase orders will indicate the address for delivery. All goods received must be accepted by an authorized District employee who must certify that the goods were received in good condition, before payment can be approved.

No payment for goods or services will be made unless an itemized invoice showing the name of the person or firm to whom payment is due is present; a receiving copy of the purchase order bearing the signature of an authorized school employee is present; and the invoice has been issued in response to an approved purchase order.

Special Circumstances**State Contracts**

For supplies and equipment available under state contract, which are below the state contract price, no further quotes are required provided the product is the same brand and model number and below the \$20,000 bid threshold.

Requests for Proposals

The District may use a request for proposal process for securing services, supplies, or equipment when the process is permitted by law, is not inconsistent with District policy, and is in the best interests of the District. This process will include, but not be limited to:

- 1) The development of specifications designed to ensure the successful proposer's ability to perform the proposed contract;
- 2) Appropriate advertisement or solicitation of proposals;
- 3) A review and evaluation of each proposal submitted;
- 4) Board approval of any contract or contracts awarded to one or more successful proposers; and

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- 5) Any other requirement specified in state or federal law or regulation, or District policy or regulation.

Independent Auditors

In accordance with law, no engagement with an independent auditor will be for a term longer than five consecutive years. The District may, however, permit an independent auditor engaged under an existing contract for those services to submit a proposal for services in response to a request for competitive proposals or be awarded a contract to provide services under a request for proposal process.

***Apparel and Sports Equipment Purchases**

The District will not purchase any apparel or sports equipment manufactured in a sweatshop. A decision to reject a vendor's proposal may be based upon either or both of the following considerations:

- 1) The labor standards applicable to the manufacture of the apparel or sports equipment including, but not limited to, employee compensation, working conditions, employee rights to form unions, and the use of child labor; or
- 2) The vendor's failure to provide information sufficient for the Board to determine the labor standards applicable to the manufacture of the apparel or sports equipment.

***Environmentally Sensitive Cleaning and Maintenance Products**

The District will identify and procure environmentally sensitive cleaning and maintenance products available in the form, function, and utility generally used. The District will follow any and all applicable guidelines, specifications, and sample lists when purchasing such products for use in its facilities. The District will notify their personnel of the availability of guidelines, specifications, and sample product lists.

Annual Review

From time to time, comments concerning the policies and procedures will be solicited from employees of the District involved in the procurement process.

The Board will annually review these policies and procedures. The School Business Official will be responsible for conducting an annual review of the procurement policy and for an evaluation of the internal control structure established to ensure compliance with the procurement policy.

***District Options**

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**Non-Instructional/Business
Operations**

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Unintentional Failure to Comply

Any unintentional failure to fully comply with these provisions will not be grounds to void action taken or give rise to a cause of action against the District or any District employee.

