

3320-R Purchasing

I. Requests for Goods and Services

Requests for supplies, materials, equipment, and services are to originate from the person responsible for their use. Current pricing ~~and catalogs~~ will be used at all times. Building administrators will appoint a designee who will examine requests to determine if there are sufficient funds available and approve or disapprove them. Upon approval of the request, the person responsible for placing orders at the building level may seek assistance in preparing specifications from the Purchasing Department and/or from the person requesting the goods or services. After the specifications are determined, a purchase requisition will be generated in the purchasing system by the building designee or the Purchasing Department. If detailed specifications are not necessary, a purchase order will be generated after building and Finance Department approval.

Purchases not made with a purchasing card require an approved purchase order prior to ordering goods or services. Permission has been granted to enter requisitions after the fact for the following exceptions:

- chain stores that use District-approved store credit cards
- bottled water or similar vendors
- utilities
- parts for repairs and parts inventory (Maintenance, Transportation, and Electronic Technician Departments only)
- billed consultants and legally required publications in a newspaper of general circulation as approved by the Superintendent or Associate Superintendent for Instructional Support
- emergency situations as approved by the Superintendent or Associate Superintendent for Instructional Support
 - A bona fide operating emergency is defined as a situation that needs immediate attention in order to prevent loss of property or to rectify a dangerous situation which is not predictable.
 - In the event of an emergency, the purchaser and the Associate Superintendent for Instructional Support, or designee, will discuss the problem and determine the appropriate action.

For purchases of goods made due to these exceptions, a requisition must be entered within three (3) working days from the receipt of goods. For purchases of services made due to these exceptions, a requisition must be entered within three (3) working days from the receipt of the invoice.

The Associate Superintendent for Instructional Support, or a designee, will review and approve all purchase requisitions for proper account coding.

The Purchasing and Finance Departments will receive purchase requisitions entered into the purchasing system and confirm that all Board purchasing policies and regulations are adhered to. All purchases will be processed in a manner most beneficial to the School District.

No purchase request is deemed valid until it has been approved by both the Purchasing and Finance Departments and a purchase order has been created.

Invoices and statements for all purchase orders are to be sent for processing to:

Campbell County School District
Accounting Department
1000 West Eighth Street
PO Box 3033
Gillette, WY 82717-3033

II. Quote and Bid Requirements

Purchases of less than ~~one thousand five hundred dollars (\$1,500.00)~~ **two thousand five hundred dollars (\$2,500.00)** must have one quote and should be obtained locally whenever possible. Quotes can be verbal, a screen print from the vendors' website, or written. Exception: Purchases made with federal funds cannot give any preference to in-state or local vendors.

~~Purchases of one thousand five hundred dollars (\$1,500.00) to less than five thousand dollars (\$5,000.00) must have two (2) quotes obtained in or outside the community. Quotes can be a screen print from the vendors' website or written.~~

Purchases of ~~five thousand dollars (\$5,000.00)~~ **two thousand five hundred dollars (\$2,500.00) to less than ten thousand dollars (\$10,000.00)**, must have at least two (2) written quotes obtained in or outside the community.

Purchases of ten thousand dollars (\$10,000.00) or more require competitive bids as per ~~Wyoming Statutes and~~ District Policy 3320. Bids will be processed by the Purchasing Department. Bid documents will be kept on file for inspection in the District's Purchasing or Finance Department for five (5) years. Board approval is required for purchases of ten thousand dollars (\$10,000.00) or more.

Additional information on bids and quotes:

- In some situations bid and quote requirements may be waived pending approval of the Associate Superintendent for Instructional Support or designee. Those possible purchases follow:
 - Technology
 - Textbooks
 - Buses
 - Federal Funds
 - Federal Grants
- Quotes must be scanned and attached in the purchasing system when creating a requisition or attached to the purchasing card log.
- Screen print from the vendors' website must clearly show the vendor information along with the description, quantity, and pricing for each item.
- Verbal quote - Information on verbal quotes should include the name of the person giving the quote along with the date of the quote. This information must be listed on the requisition or included as an attachment.
- Written quote – A written quote is an official quote generated by the vendor and is submitted to the School District by email, fax or postal mail.
- Quotations will be kept on file for inspection in the building generating the purchase for five (5) years and copies of documents must be attached to the

purchasing requisition.

III. Bid Process

A bidders list will be maintained by the Purchasing Department. Bidders who fail to submit a bid without submitting a written "no bid" response will be removed from the bidders list.

Specifications and bid forms will be prepared by the Purchasing Department and distributed to prospective bidders on the current bidders list. Bid forms will also be made available at the Purchasing Department during business hours.

Bids will be opened and publicly read prior to recommendation for acceptance or rejection by the Board. Normally, bid openings will be held in the Purchasing Department; however, the Board may request the bid opening be held during a school board meeting.

Campbell County School District reserves the right to accept or reject any item or all items, any part or all parts, any section or all sections, any bid or all bids as stated in the specifications; to waive any irregularities or informalities, or to rebid or re-advertise for bid if it is determined to be necessary or desirable; and reserves the right to award the bid in any manner it sees fit. The award of a purchase order or contract will be made after consideration of quality of the product or service being bid, conformity to specifications, general reputation of the bidding firm, price, terms, service, and date of delivery. Alternates will be considered on their own merits. In the case of a tie bid, the Associate Superintendent for Instructional Support, or designee, will recommend the award to the best advantage of the District. The Superintendent for Instructional Support will be responsible for the settlement of any bid protests.

IV. Other Considerations

Sole Source items are items that are only available from one source in the United States. An item cannot be sole-sourced based on a brand name only. Any exceptions to this must be approved by the Associate Superintendent for Instructional Support or designee. Requests for Proposal or Quotes (RFP's/RFQ's) for professional services are to follow the District purchasing policies, procedures, and regulations. Purchases more than ten thousand dollars (\$10,000.00) will require a Request for Proposal or Quote (RFP/RFQ). This requirement may be waived based on the recommendation of the Associate Superintendent for Instructional Support or designee. Final approval by the Board is required for these items.

Engineering, architectural, and surveying services will be procured according to Wyoming Statutes and District Policy 3320. Board approval is required for these items.

Personal service agreements with any public or private agency, institution, person, or corporation, and all amendments thereto, must be approved by the Board of Trustees. Agreements that are less than one thousand five hundred (\$1,500.00) (such as officials or accompanist, etc.) may be granted an exception by the Superintendent or Associate Superintendent for Instructional Support.

Board approval is required for contracts. Exceptions are renewals or extensions for maintenance or service agreements and print or electronic subscriptions in an amount less than ten thousand dollars (\$10,000.00).

Purchase requisitions, orders, and contracts may not be divided for the purpose of avoiding

these policies and regulations.

Bus purchases will be made in accordance with Wyoming Statute § 21-12-320. The Purchasing Department will obtain quotes upon request.

Any exceptions to this regulation not listed above will be reviewed and approved by the Superintendent or the Associate Superintendent for Instructional Support.

V. Local and Will Pick-Up Purchases

Purchases that will be picked up from local vendors, or vendors outside the community, and do not fall under exceptions listed in Section I will be processed in the same manner as any other purchase request.

In cases where the total amount or quantity is uncertain such as when purchasing groceries, the estimated amount should be entered on the requisition. These purchases should be less than ~~one thousand five hundred dollars (\$1,500.00)~~ **two thousand five hundred dollars (\$2,500.00)** or additional quote requirements as listed in Section I will apply.

For equipment purchases, refer to Regulation 3310-R. All guidelines must be adhered to, and all required information must be forwarded to the designated employee so that an asset tag can be issued and entered into the fixed assets system.

VI. Agency Fund 80 Purchases

Money held in Agency Fund 80 is not in the control of Campbell County School District. However, the District is responsible for insuring that agency funds are used only for their intended purposes and by those to whom the money belongs. Purchases within this fund must have approval of a class or club officer and sponsor and the building administrator prior to any purchase. It is the responsibility of the class or club officer and sponsor to determine if monies are available. A proper purchase order must be completed before a purchase may be made if the purchase is not made with a District purchasing card.

Agency funds may be used to purchase equipment. However, money must be transferred to the general fund and the requisition entered through a general fund account code. This will allow the District to better track assets.

VII. Fixed Asset Purchases

When purchases are made that meet the fixed or property asset guidelines in Regulation 3310-R, the following information must be contained in the body of the requisition:

Accurate description of the item(s), make, model, room number, name of the person who will use the equipment.

Normally, items should be delivered through the central warehouse for processing.

The Purchasing Department will procure any fixed asset items that cannot be procured with a purchase order.

VIII. Chemicals

For purposes of standardization and safety, all new chemical purchases must be approved by the Purchasing Department, and/or Safety-Risk Manager, and/or Secondary Science Facilitator prior to purchase.

IX. Purchases That Affect Building Systems

Any item that can affect or have an impact on wiring, plumbing, or other major building systems must be approved by the Maintenance Department prior to the purchase.

X. Purchasing Cards

District employees may make purchases using their District-issued purchasing card. These purchases do not require an advance purchase order but are subject to all other District purchasing policies and procedures including those procedures outlined in the District Purchasing Card Procedures Manual.

XI. Credit Cards

Credits cards, either personal or District, are not to be used to avoid the purchasing policies, procedures, and/or regulations.

XII. Funds Used for Purchases Including Federal or Grant

Purchases made with federal funds will follow the federal purchasing policies, procedures, and regulations. ~~unless the District policies and procedures are more restrictive in which case they will apply to the purchase.~~ All purchases using federal funds will be conducted in a manner to ensure full and open competition.

XIII. Wyoming Sales Tax

Wyoming sales tax will not be reimbursed to employees purchasing goods or services for in-state charges for District use.

XIV. Bucks, Gift Cards and 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/gold bucks, 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.

XV. Equal Employment Clause for Contracts

Every contract, unless exempted by rules, regulations, or orders issued pursuant to Section 204 of Federal Executive Order 11246, will include the following equal opportunity clause.

Campbell County School District hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority business enterprises will

be afforded full opportunity to submit bids in response to this invitation. No bidder will be discriminated against on the grounds of race, sex, age, color, or national origin in consideration for an award.

When it may be reasonably expected that a supplier will provide goods or services in excess of ten thousand dollars (\$10,000.00) within a current fiscal year, the District may require such supplier to provide evidence of his or her compliance with Executive Order 11246, as amended, in a manner satisfactory to Campbell County School District.

XVI. Wyoming Preference

In all District purchases of supplies, material, equipment, machinery, and provisions to be used in the maintenance and upkeep of District facilities, a preference of five (5) percent will be granted for supplies, materials, agricultural products, equipment, machinery, and provisions produced, manufactured, or grown in the State of Wyoming, and supplies, materials, equipment, machinery, and provisions supplied by a resident of the state as defined in Wyoming Statute § Section 16-6-101

Purchases are to be made from suppliers competent and capable of providing the goods or services they offer. No Wyoming preference will be granted for articles of inferior quality as compared to those offered by competitors outside Wyoming.

Purchases made with federal funds cannot give any preference to in-state or local vendors.

XVII. Reimbursements

No reimbursements will be allowed without prior approval from the Associate Superintendent for Instructional Support, or designee, with the exception of supervisor-approved Employee Travel Reimbursement Voucher forms.

XVIII. Debarment and Suspension - see 3320-Form

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LEGAL REFERENCE(S): 2 CFR 200.319; Section 204 of Federal Executive Order 11246; W.S. 21-3-110(a)(ii)(B)(viii) of the Wyoming Education Code; W.S. 16-6-1001; W.S. 16-6-101; W.S. 9-2-1031; W.S. 21-12-320, IRS Publication 15-B

CROSS REFERENCE(S): 3320, 3320-Form, 3310, 3310-R ADMINISTRATIVE

REGULATION: