

DeForest Area School District
Administrative Regulation

TITLE: PURCHASING GUIDELINES	NUMBER: AR 9.7(15)
<i>Executive Limitation: EL 9, Asset Protection (9.7 – Fund Management Practices)</i>	
Recorded as Administrative Regulation: <i>Established: 3/8/04 Revisions:</i>	
Origin as Board Of Education Policy: Fiscal Management 672 <i>Established: 1980 Revisions: 9/28/93, 2002</i>	

The purchasing objective of the district shall be to provide services, materials, and supplies that offer district personnel the most effective and efficient means to perform their tasks. The policy of the District will be to acquire these at a minimal cost, taking into consideration the best interest of the school district. The Director of Business & Auxiliary Services shall serve as the purchasing agent for the school system.

The District will follow guidelines with regard to purchasing:

A. General Guidelines

1. In awarding purchases or contracts for services, the Director of Business & Auxiliary Services or his/hers designee, shall consider the following: (a) price; (b) quality of products; (c) service, delivery and maintenance of product; (d) suitability of product; (e) conformance to needs and specifications; (f) past performance to the school district; and (g) vendor reliability.
2. The District directs that all purchases from all funds under its control and responsibility, be made, after proper written documentation is secured to support such purchase, excluding purchases of a minor or emergency nature.
3. The District will have a fully operative purchase order system as a means of budgetary control.
4. Vendor competition in purchasing shall be practiced whenever possible.
5. Sufficient amounts must have been budgeted in appropriate accounts and sufficient funds must be available in said accounts, or line item transfer approval must be given.
6. The Director of Business & Auxiliary Services shall maintain the price quotation or competitive bids obtained from vendors for goods or services. These copies are to be retained until the audit for the fiscal year has been formally accepted.

7. The Director of Business & Auxiliary Services is authorized to enter into cooperative agreements with other school districts for the purchase of any product or service used by the school district, when such arrangements will be for the benefit of the district.

B. Non-Negotiate Purchases

Non-negotiated purchase can be made when there is only one supply source, provided the amount does not exceed bidding requirements.

C. Bids or Quotations

1. Bids are not required for:
 - a. Instructional textbooks, films, workbooks, educational kits, newspapers, and audio-visual materials.
 - b. Replacement parts for existing equipment where, the value of the parts, are estimated to be less than 50% of the total value of the equipment.
 - c. Cooperative Education Service Agency (CESA) and other inter-government contracts.
 - d. Maintenance contracts of at least one year's duration where the maintenance is to be performed on a routine or as needed basis on specific equipment. Such contracts shall include the additional cost of all repairs or replacement parts.
 - e. Personal service contracts.
 - f. Used equipment (including demonstrations) where a definite cost advantage can be demonstrated.
2. Informal quotations may be used to insure the best possible price (verbal information of price on equal products or services), secured in person or by telephone, should be used when purchasing individual supply items or non-capital equipment costing less than \$1,000.
3. The Director of Business & Auxiliary Services, or his/her designee, is authorized to purchase any item, group of items in a single transaction, costing more than \$1,000 upon the receipt of at least three written quotations or bids. The Director of Business & Auxiliary Services, or his/her designee, shall use discretion in deciding whether such purchases are made on the basis of requested quotations or through advertising for bids.

4. No purchase shall be made for supplies, services, or equipment costing \$10,000 or more unless competitive bids, proposals or quotations for those items are obtained.
5. Bids of \$10,000 or more shall be opened publicly at a specified time and place as stated in the bid advertisement or in the invitation to bid. The Director of Business & Auxiliary Services and/or his/her designee are authorized to open said bids.
6. The District shall have discretion in determining the responsibility of the bidders and generally shall award the contract to the lowest responsible bidder, provided specifications are fully met. The district may also consider available services and delivery in determining the successful bidder.
7. The District reserves the right to accept or reject any bid which it feels is in the best interest of the district, and delegates this authority to those responsible for the purchases.
8. Competitive Bids or Negotiated Contracts on Building Construction, Renovation and Repairs.
 - a. Prior to commencing construction of a new building, additions, repairs, or renovation of an existing building costing \$100,000 or more, the district shall obtain competitive bids or negotiate a contract on all materials and labor for the project. When appropriate, bid specifications or contracts shall include penalty clauses. Repair work normally done by school district employees is exempted from this bidding requirement.
 - b. The District may reject any or all bids, and in the event all bids are rejected in a manner provided by state law or administrative policy the District may re-advertise.

D. Purchasing for resale to individuals/organizations

Under no circumstances may the school district purchase items for resale to school district staff or other individuals or organizations for personal use.

E. Emergency Purchases

Emergency purchases may be made without using the quotation or bidding process. Such emergencies may arise as a result of an accident or other unforeseen occurrence that could affect the life, health, welfare or safety of the school district's students or employees. Such purchases shall be reported to the board at the first practicable opportunity.

F. Purchasing Rules and Regulations

The Director of Business & Auxiliary Services shall develop the necessary rules and regulation to implement this policy, including requisition and approval procedures, verification of purchases, and verification that goods have been received in an acceptable condition and services performed in an acceptable manner.

Reference:

Sections 120.13(5) & (32), 946.13 Wisconsin Statutes

Cross Reference:

AR 9.7(16) - Local Purchasing

AR 9.7(17) - Payment Procedures