#### ST. LOUIS BOARD OF EDUCATION POLICY

## **BUSINESS AND NON-INSTRUCTIONAL OPERATIONS**

## **EXPENDITURES**

# **Purchasing Procedures**

Requesting Goods and Services (Creating Requisitions)

# **Purchasing Policy**

# Structure and Authority

- 1. The Board of Education intention is to purchase competitively without prejudice, and to seek maximum educational value for every dollar expended.
- 2. The Function of Purchasing is to serve the educational programs by providing the necessary supplies, equipment and services.
- 3. The Superintendent or a designee chief financial officer and / or purchasing officer -may execute and award contracts and purchase orders for the district when funds are available to pay such obligation and the purchase is in accordance with the district purchasing policy.
- 4. The Board of Education delegates purchasing decisions based on the following parameters
  - a. If the purchase has a total of \$3,000 or less, quotations may not be taken depending on the judgement of the purchasing officer.
  - b. If the purchase of supplies or capital assets has a total amount between \$3,000 and \$5,000, three written quotations shall be collected.
  - c. If the purchase of supplies or capital assets has a total amount that exceeds \$5,000, bids shall be collected via the sealed bid process.
    - i. Purchases of supplies or capital assets with a total amount that exceeds \$5,000, shall be presented by the superintendent to the board with a recommendation for approval
  - d. If the purchase of services has a total amount between \$3,000 and \$50,000, three written quotations shall be collected.
  - e. If the purchase of services has a total amount that exceeds \$50,000; bids shall be collected via the sealed bid process.

- Purchases of services with a total amount that exceeds \$50,000, shall be presented by the superintendent to the board with a recommendation for approval
- f. All items successfully bid through the State of Missouri, Education Plus, BuyBoard, Omnia Partners, or other approved cooperative bidding contracts may be purchased at the stated bid price without the district obtaining additional bids.
- g. If the item is available from only one source, or the emergency for the requirement will not permit a delay resulting from competitive procurement, or after the solicitation of a number of sources, competition is deemed inadequate, the Purchasing Officer can award the contract / purchase as a sole source award.
- 5. The Board of Education has to approve any agreement lasting longer than twelve months, or any agreement that includes an option to renew which when combined would last longer than a year.
- 6. Orders placed without an authorized purchase order or purchases made in violation of the districts purchasing policy and procedures are the individual's responsibility and liability. Payment of such obligations is not the district responsibility. Only the Superintendent or a designee (chief financial officer and / or purchasing officer) may authorize payment of such obligations, which were made in violation of the district purchasing policy.
- 7. Unless otherwise required by law, the superintendent may waive the requirement for competitive bids or proposals when he or she has determined that there exists a threat to life, property, public health or public safety or when immediate expenditure is necessary in order to protect against further loss of or damage to property, or to prevent or minimize a serious disruption in services. Emergency purchases shall be made with as much competition as is practical under the circumstances and will only be utilized for purchases that are necessary to alleviate the emergency.
- 8. The district will not do business with providers who have been suspended or debarred on a state or federal level unless the superintendent authorizes the transaction and provides the Board with written justification. District employees are directed to verify that selected providers are in good standing before making a purchasing decision.
- Sealed bids and related documents will be kept confidential until bids are opened.
  District staff will not disclose offers, bids or price quotations to competitors except as necessary to conduct negotiations beneficial to the district or as required by law.

- All contract negotiations and related documents are considered closed until a contract is executed or all proposals are rejected.
- 10. Authorized district employees and Board members may use credit cards or purchasing cards issued to the district to make purchases for the district or to pay for reasonable travel expenses incurred when performing job duties. Employees and Board members will not use these cards to circumvent the bidding and purchasing requirements established by law and Board policy. All purchases made using district cards must be attributed to the appropriate budget code and must conform to the Board-adopted budget.

# Prohibited Activity and Reporting Requirements

The district expects all staff members to comply with the letter and intent of all district policies and procedures regarding purchasing. Under no circumstances may employees use district funds to make unauthorized or personal purchases. Staff members may not artificially divide purchases to avoid bidding requirements or design bid specifications to favor a particular provider.

All district employees must report suspected fraud, theft or misuse of district funds to the superintendent or purchasing officer immediately. District employees may be disciplined or terminated from employment for failing to follow Board policy or district procedures and for any misuse of district resources, including district cards.

The superintendent or purchasing officer will contact law enforcement and file a report or sign a complaint on behalf of the district in situations where a crime may have occurred

### State and Federal Procurement

The Board of Education delegates State and Federal Purchasing decisions based on the following parameters of the U.S. Dept. of Education Procurement Policies, Title 2 of the Code of Federal Regulations, Part 2 (2CFR Part 200)

# 1. Micro Purchases

a. Total amount of cost threshold is \$3,000 or less. Micro-purchases may be awarded without soliciting competitive quotations, if Purchasing considers the price to be reasonable

# 2. Small Purchases

a. Total amount of cost threshold range is between \$3,000 and \$150,000.Small purchases are those simple and informal procurements for securing services,

supplies, and other property. Price or rate quotations must be obtained from an adequate number of qualified sources.

#### Sealed Bids

a. Total amount of cost threshold is above \$150,000. Formal Advertising, bids are publicly solicited, and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material items and conditions of the invitation for bids is the lowest in price

## 4. Competitive Proposals

a. Total amount of cost thresholds is above \$150,000. Requests for Proposals must be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals must be considered to the maximum extent practical. Contracts are awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered.

# 5. Non Competitive Proposals

- a. Procurement by noncompetitive proposals is procurement through the solicitation of a proposal from only one source and may be used when only one or more the following circumstances apply:
  - i. The item is available from only one source
  - ii. The public emergency for the requirement will not permit a delay resulting from competitive procurement
  - The Federal awarding agency or pass through entity expressly authorizes noncompetitive proposals in response from the nonfederal entity
  - iv. After the solicitation of a number of sources, competition is deemed inadequate.

For a full listing of the State and Federal Procurement Purchasing Requirements Standards please Refer to the U.S. Dept. of Education Uniform Guidance; Title 2 of the Conde of Federal Regulations, Part 200 (CFR Part 2000

## References

Legal: RSMo Sections 177.086, 177.161, 177.171

U.S. Dept. of Education Uniform Guidance, Title 2 of the Code of Federal

Regulations, Part 200 (2 CFR Part 200)

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