

Adopted: Original:1/29/2015

Revised: 2/24/2015

Revised: 8/25/2020

700 CSP PURCHASING AND PROCUREMENT PROCESS AND PROCEDURES POLICY

I. PURPOSE

No employee, officer, or agent of the District may participate in the selection, award, or administration of any contract supported by Federal funds if a real or apparent conflict of interest exists.

II. GENERAL STATEMENT OF POLICY

- A. District staff will follow a free and open competitive process.
- B. District staff will document purchasing activities and decisions.
- C. District staff who want to purchase something will discuss this with any connected parties (Sped team, Tech team, marketing team,) and possibly the whole staff.
- D. The request would be communicated to the Finance Committee as a verbal request for a purchase order (PO).
- E. The Finance Committee would inform the Office Manager to generate a PO and have the Convener sign it.
- F. District staff should contract with small and minority forms and women's business enterprises.
 - 1. District staff will take all necessary affirmative steps to assure that small and minority firms and women's business enterprises are used when possible.
 - 2. Affirmative steps include:
 - a. Placing qualified small and minority business and women's business enterprises on solicitation lists;
 - b. Assuring that small and minority business and women's business enterprises are solicited whenever they are potential sources;
 - c. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;
 - d. Establishing delivery schedules, where the requirements permits, which encourage participation by small and minority business and women's business enterprises; and
 - e. Using the services and assistance of the Small Business Administration,

and the Minority Business Development Agency of the Department of Commerce.

3. District staff would select one of the three permitted procurement methods from which to make the purchase.
 - a. Small purchases may be used for procurement of \$100,000 or less in the aggregate.
 - b. Small purchases are usually made through the use of purchase orders for purchases of goods and written contracts for purchases of consultant vendor services;
 - c. Proposals must be solicited from an adequate number of qualified sources (three to five) consistent with the nature and requirements of the procurement;
 - d. Competition is sought through oral or written price quotations but must be documented; and
 - e. For procurement of goods, catalogs or price lists may also be used.
4. Competitive Proposals

A procurement in excess of the small purchase threshold (more than \$100,000) may not be inappropriately broken up into smaller components solely to qualify for the less complicated procedures followed under the "small purchases" approach. * Contact MDE for guidance on competitive proposal procedures.
5. Noncompetitive proposals/sole source procurement.

*Noncompetitive negotiations may be utilized only under very limited circumstances. The buyer must show that another method of procurement was infeasible because:

 - a. The item or service was only available from a single source;
 - b. A public emergency or condition requiring urgency existed which did not permit the use of competitive procurement; or,
 - c. Competition was determined to be inadequate after receiving proposals from numerous sources.
6. For procurements within the small purchase threshold (\$100,000) the written procurement procedures must:
 - a. Ensure that the purchase of unnecessary or duplicate items is avoided.
 - b. Make sure a cost or price analysis is performed for every proposed procurement action, including contract modifications, and documentation to that effect is maintained in the procurement file.
7. Selection procedures must ensure that:
 - a. Awards are to be made to the bidder/offer or whose offer is responsive to the solicitation and is most advantageous to the charter school, price and other factors considered;
 - b. Any and all offers may be rejected when it is in the District's interest to do so;
 - c. The District staff must ensure that the award is only made to responsible contractors possessing the ability to perform successfully under the terms

- and conditions of the proposed procurement;
 - d. Consideration should be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources; and
 - e. Check references, contact current and prior clients
8. District staff must maintain records to detail the significant history of a procurement. These records include, but are not limited to documentation on:
 - a. The rationale for selecting the method of procurement used;
 - b. The rationale for selecting/rejecting the contractor;
 - c. The rationale for selecting the type of contract;
 - d. The basis for the cost or price of a contract;
 - e. The receipt of an adequate number or price or rate quotations from qualified source; and
 - f. Justification for lack of competition when competitive bids or offers are not obtained. District staff would then coordinate the purchase, possibly completing the purchase themselves. The purchase would preferably be made on credit with a check sent after the item(s) is received, but the purchase could be made using a school debit or credit card. The purchase order would show this.
 9. The Office Manager or other District staff would receive the item(s), and attach verification of receipt to the PO. This would normally be a signed packing slip.
 10. When the invoice arrives it too would be attached to the PO and packing slip and made ready for payment.
 11. The Office Manager will generate checks from invoices – if there were any question as to the receipt of the item or completion of the work the Finance Committee would verify before the check is written.
 12. The check(s) would be taken to two (2) of the designated check signers (signers are approved by the School Board at Annual Organization Meeting)
 13. The check would be mailed out at this point.