

Requesting Goods And Services (Bids And Quotations)

The Purchasing Department shall periodically project requirements of standard items or classes of items and make quantity purchases thereby effecting prudent expenditures of district funds. Whenever storage facilities or other conditions make it impractical to receive all of any item at one time, the total quantity should be bid and staggered delivery dates made a part of the bid specifications or estimated quantities bid with deliveries to be made as requested.

Purchasing shall be by competitive bidding, when required by the Education Code and/or Public Contract Code, with awards to the lowest responsible bidder meeting bid instructions, conditions, and specifications as follows:

1. Purchases for expenditures under \$15,000 for work to be done or under \$52,900 for materials or supplies (except perishable and seasonal food products and commodities purchased under an active bid awarded by the Governing Board) to be furnished, sold or leased shall be by informal telephone or written quotations and shall be awarded under the following format.
 - a. All purchase orders under \$10,000 either for work to be done or for materials or supplies shall be awarded at the discretion of the Director of Purchasing and ratified by the Governing Board.
 - b. Purchase orders with a value between \$10,000 and \$15,000 for work to be done or \$10,000 and \$52,900 for materials or supplies shall be approved by Superintendent or the Chief Financial Officer and ratified by the Board.
2. Purchases for expenditure over \$15,000 for work to be done and over \$52,900 for materials or supplies to be furnished, sold, or leased shall be by formal advertised bid proposal and formal award by the Board; the proposal will include the bid agreement, bid instructions and conditions, for the materials desired.
 - a. Contracts, including purchase orders, involving an expenditure of more than \$15,000 for work to be done or more than \$52,900 for materials or supplies to be furnished, sold or leased to the district shall be let (awarded) by the Board to the lowest responsible bidder who shall give such security as the Board requires or else reject all bids pursuant to Public Contract Code.
3. After the public reading of formal bids, a tabulation and evaluation will be made. A recap of the bid shall be posted in the Purchasing Department for interested parties. All vendors who returned a bid shall receive a copy of the bid summary. The award will be made in accordance with Board policy.
4. The district reserves the right to accept or reject any or all proposals or bids, or any combination thereof and to waive any informality or irregularity in the bid or in the bidding.
5. When all considerations of a bid are equal, the award shall be handled as follows:
 - a. Single item bid - Equal bids shall be awarded by drawing except that preference shall be given to local firms. A local firm is defined as one established in Fresno County with normal wholesale

or retail outlets, a stock of merchandise (not necessarily related to bid), not less than one clerk, deliver system or a combination of the above factors.

b. Multiple item bid - Equal multiple bids shall be awarded to the firm submitting the aggregate of lowest prices on that bid, except that preference shall be given to local firms.

c. Equal aggregate bids between either all local or all out-of-town firms shall be awarded by (1) award of the items to firms submitting the most low bids, or (2) by a drawing, unless otherwise specified in bid.

6. The following approval reporting process will be followed:

a. Purchase orders/contracts which exceed the statutory bid limits will be presented to the Board for award at regularly scheduled Board meetings.

b. Purchase orders/contracts with a value between \$10,000 and \$15,000 for work to be done and \$10,000 and \$52,900 for materials or supplies shall be ratified by the Board upon recommendation of the Superintendent and/or the Chief Financial Officer. Purchase orders in this category will be identified at each regularly scheduled Board meeting.

c. Purchase orders/contracts under \$10,000 shall be ratified by the Board for award at regularly scheduled Board meetings. These purchase orders will be consolidated into a report which will identify the purchase order numbers and the total amount of the combined purchase orders.

Specific Purchasing Assignments

1. The Purchasing Department shall establish practical and efficient office procedures, reports, records, and systems that will allow the department to give maximum effort to the educational program and assist the administration in its role of management.

2. The Purchasing Department shall not sign sales agreements on purchases that exceed the bid limits until after the Board has authorized the purchases except in cases of emergency purchases which will then be submitted to the Board at the next Board meeting for ratification.

3. The Purchasing Department shall maintain a file of current trade catalogs, which shall be available to all departments.

4. The Purchasing Department and Accounting Department shall maintain a system of warehouse inventory control to account for available equipment and supplies.

5. The Purchasing Department shall handle the disposal of all surplus, obsolete or scrap material.

Purchasing and Staff Relationships

1. All requests for prices or for repair service and all purchases shall be made by the Purchasing Department.

2. If it is necessary to contact salespeople regarding special or highly technical details of their products, schools or departments should request such visits through the Purchasing Department. Salespeople shall not be permitted in schools or departments for the purpose of making sales.
3. All communications with suppliers' should be through the Purchasing Department, except in special cases where the technical details make it advisable to delegate authority to others. A copy of all correspondence should be forwarded to the Purchasing Department.
4. No employee of the school district should endorse commercial products. In discussions with commercial representatives, school district employees should be reminded that only the Purchasing Department has the authority to commit the expenditure of funds for materials. Information with regard to prices for specific materials shall be furnished by the Purchasing Department.
5. The Purchasing Department shall strive constantly to increase its knowledge of new materials, services, sources, prices and processes in manufacturing, and shall keep other departments informed.
6. There should be growing recognition of the integral interdependence between the classroom teacher, principal, and the various central administrative departments with the Purchasing Department.
7. The Purchasing Department shall seek competent counsel from its colleagues regarding matters of common interest.
8. Specification for required materials is a prerogative of each using department; however, the Purchasing Department may question the quality and kind of material requested and should make recommendations relative to safety, health, economy and substitute materials. Disagreements over materials that cannot be reconciled between the Purchasing Department and the requisitioner should be forwarded to the proper staff members of committee for decision.

Sole Source Procurements

The purchasing department shall not make any procurements under the sole source doctrine unless the following three conditions are met.

1. A detailed recommendation for "Sole Source Procurement" is submitted by the Executive Director of Purchasing to the full Board of Education for approval prior to the actual procurement.
2. The Associate Superintendent/C.F.O. concurs with the recommendation of the Executive Director of Purchasing.
3. The full Board of Education, by unanimous vote, approves the use of the "Sole Source" procurement.
4. The sole source doctrine, if approved by the full Board of Education, shall be limited to circumstances such as:

- a. Only a single service or produce is available
- b. Services are offered by a government-regulated monopoly
- c. Contract is for an experimental or unique product

NOTE: This exception is construed narrowly and will be analyzed carefully prior the purchase of products or equipment without bids, under a Board of Education approved "Sole Source" authorization.

Regulation FRESNO UNIFIED SCHOOL DISTRICT

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