

SHARON SPRINGS CENTRAL SCHOOL PURCHASING PROCEDURE

It shall be the policy of the Sharon Springs Central School Board to operate a centralized purchasing program for the purchase of all goods and services. In addition, it shall be district policy to procure goods and services of the highest quality at the best price. Should quality and price be equal, it shall be the policy to purchase from sources within the district boundaries, if possible. Whenever required by law, purchasing shall be done by calling for bids or quotations. The District reserves the right to determine quality and suitability of items bid. Items of a specialized nature shall be purchased from the best source available. Purchasing will be centralized in the business office under the general supervision of the Purchasing Agent designated by the Board of Education upon recommendation by the Superintendent of Schools.

It is the goal of the Board to purchase competitively, without prejudice or favoritism, and to seek the maximum educational value for every dollar expended. Competitive bids or quotations shall be solicited in connection with purchases pursuant to law. The General Municipal Law requires that purchase contracts for materials, equipment, and supplies involving an expenditure exceeding \$20,000 and public work contracts involving an expenditure of more than \$35,000 will be awarded only after responsible bids have been received in response to a public advertisement soliciting formal bids.

Pursuant to General Municipal Law Section 104-b(2) (f), there may be circumstances when, or types of procurement for which, the solicitation of alternative proposals or quotations will not be in the best interest of the District. Such circumstances include professional services or services requiring special or technical skill, training or expertise. When such a circumstance arises, the individual or organization will be chosen based on accountability, reliability, responsibility, skill, education and training, judgement, integrity, and moral worth. These qualifications are not necessarily found in the individual or company that offers the lowest price and the nature of these services are such that they do not readily lend themselves to competitive procurement procedures.

In determining whether a service fits into this category the District shall take into consideration the following guidelines: (a) whether the services are subject to State licensing or testing requirements; (b) whether substantial formal education or training is a necessary prerequisite to the performance of the services and (c) whether the services require a personal relationship between the individual and municipal officials. Professional or technical services shall include but not be limited to those of the following: attorney; auditor; physician; engineer; insurance broker; certified public accountant; investment

management services; or computer software or programming services for customized programs.

Goods and services which are not required by law to be procured by the district through competitive bidding will be procured in a manner so as to ensure prudent and economical use of public monies, in the best interest of the taxpayers, to facilitate the acquisition of goods and services of maximum quality at the lowest possible cost under the circumstances, and to guard against favoritism, improvidence, extravagance, fraud and corruption.

As such, alternative proposals or quotations will be secured every time according to the cost structure outlined within this policy, and at least every five years for professional services or services requiring special or technical skill, training or expertise as noted above. Alternative proposals or quotations will be secured by requests for proposals, written or verbal quotations, or any other appropriate method of procurement except for procurements:

1. Under a County contract;
2. Under a State contract;
3. Of articles manufactured in State correctional institutions; or
4. From agencies for the blind and severely disabled.

Additionally, for materials, equipment and supplies, where formal bidding procedures are not required by law, the following procedures will be followed:

<u>Dollar Limit</u>	<u>Procedures</u>
\$1 - \$2,500	At the discretion of the Purchasing Agent
\$2,501 - \$5,000	Documented verbal or written quotes from at least three (3) separate vendors, if available.
\$5,001 - \$10,000	Formal written quotes from at least three (3) separate vendors, if available.

The District's purchasing activity will strive to meet the following objectives:

1. To effectively supply all administrative units in the school system with needed materials, supplies, and contracted services;
2. To obtain materials, supplies, and contracted services at the lowest prices possible consistent with the quality and standards needed as determined by the Purchasing Agent in cooperation with the requisitioning authority. The educational welfare of the students is the foremost consideration in making any purchases;
3. To ensure that all purchases fall within the framework of budgetary limitations and that they are consistent with the educational goals and programs of the District;

4. To maintain an appropriate and comprehensive accounting and reporting system to record and document all purchasing transactions; and
5. To ensure, through the use of proper internal controls, that loss and/or diversion of District property is prevented.

The District will provide justification and documentation of any contract awarded to an offeror other than the lowest responsible dollar offer, setting forth the reasons why such award is in the best interest of the District and otherwise furthers the purposes of section 104b of the General Municipal Law.

The purchasing agent will not be required to secure alternative proposals or quotations for:

1. Emergencies where time is a crucial factor;
2. Procurement for which there is no possibility of competition (sole source times);
3. Procurement of professional services, which, because of the confidential nature of the services, do not lend themselves to procurement through solicitations; or
4. Very small procurements when solicitations of competition would not be cost effective.

Preference in the purchase of instructional materials will be given to vendors who agree to provide materials in a usable alternative format (i.e., any medium or format, other than a traditional print textbook, for presentation of instructional materials that is needed as an accommodation for each student with a disability, including students requiring Section 504 Accommodation Plans, enrolled in the School District). Alternative formats include, but are not limited to, braille, large print, open and closed captioned, audio, or an electronic file in an approved format as defined in Commissioner's Regulations.

As required by federal law and New York State Regulations, the District follows the National Instructional Materials Accessibility Standard (NIMAS) to ensure that curriculum materials are available in a useable alternative format for students with disabilities. Each school district has the option of participating in the National Instructional Materials Access Center (NIMAC). Whether a district does or does not participate in NIMAC, the district will be responsible to ensure that each student who requires instructional materials in an alternative format will receive it in a timely manner and in a format that meets NIMAS standards.

In accordance with Commissioner's Regulations, State Finance Law and Education Law, the District shall follow guidelines, specifications and sample lists when purchasing cleaning and maintenance products for use in its facilities. Such facilities include any building or

facility used for instructional purposes and the surrounding grounds or other sites used for playgrounds, athletics or other instruction.

Environmentally sensitive cleaning and maintenance products are those which minimize adverse impacts on health and the environment. Such products reduce as much as possible exposures of children and school staff to potentially harmful chemicals and substances used in the cleaning and maintenance of school facilities. The District shall identify and procure environmentally sensitive cleaning and maintenance products which are available in the form, function and utility generally used.

The District shall notify their personnel of the availability of such guidelines, specifications and sample product lists.

The Superintendent of Schools, with the assistance of the Business Manager, shall be responsible for the establishment and implementation of the procedures and standard forms for use in all purchasing and related activities in the District. Such procedures shall comply with all applicable laws and regulations of the State and the Commissioner of Education.

No board member, officer, or employee of the School District shall have an interest in any contract entered into by the board or the District, as provided in Article 18 of the General Municipal Law.

A requisition purchase order system will be used.

1. Every purchase made using funds managed by the district – including grant funds and credit card orders – should be made using the provided requisition form and have prior approval from one of the following members of the administrative staff:
 - a. Superintendent
 - b. Building Principal
 - c. Business Manager
 2. Upon appropriate approval, every purchase should have a purchase order completed in the District Office and must be further approved by the Business Manager.
 3. Upon receipt of goods from vendors, all purchases must be checked to ensure that quantities are correct and quality is sufficient before final delivery is made to the original requestor.
 4. Any purchase that does not follow this procedure could be returned to the vendor.
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5. In cases where claim forms (BOE Policy #8.20) are needed for special circumstances, prior approval from the Principal, Business Manager or Superintendent is necessary. Receipts accompanying claim forms must contain only the goods or services purchased for the district and may not contain any personal items. Claim forms must contain specific details regarding each item on the receipt(s), as many receipts are exceptionally unclear or give no information as to the nature of the items.
6. When fuel deliveries occur and emergency service calls are made, the Sharon Springs staff member responsible and present in these instances must sign the statement/invoice from the organization providing the service.

The Board authorizes the Superintendent of Schools, with the assistance of the Business Manager, to establish and maintain an internal control structure to ensure, to the best of their ability, that the District's assets will be safeguarded against loss from unauthorized use or disposition, that transactions will be executed in accordance with the law and District policies and regulations, and recorded properly in the financial records of the District.

The unintentional failure to fully comply with the provisions of Section 104-b of the General Municipal Law or the District's regulations regarding procurement will not be grounds to void action taken or give rise to a cause of action against the District or any officer or employee of the District.
