

PURCHASES

Upon adoption by the Board of Education of an annual appropriation resolution, the Board, by general resolution, may dispense with the adoption of resolutions authorizing the purchase or sale of property, except real estate.

Solicitation of Bids or Quotations

For those instances in which Ohio law does not establish a specific bid procedure, and the purchase item is not through a cooperative purchasing program, the originator of the purchase order, when possible, will seek at least two (2) price quotations on purchases of more than \$5,000 for a single item, except in cases of emergency or when the materials purchased are of such a nature that price negotiations would not result in a savings to the District or when the item is subject to formal bid.. Standard purchasing procedures of the District shall be followed when purchasing on the basis of price quotations from vendors.

When the Board determines to build, repair, enlarge, improve, or demolish any school building, the cost of which will exceed \$50,000.00, the Board shall follow the competitive bidding procedure set forth in O.R.C. §3313.46. Such procedure shall be followed except in cases of urgent necessity, or for the security and protection of school property, or as otherwise provided by law. In awarding the bid, the Board shall accept the bid which is the lowest responsive and responsible.

All orders or contracts are to be awarded to the lowest responsive and responsible bidder in accordance with O.R.C. §9.312. For a bidder to be deemed responsive, the bidder's proposal should respond to bid specifications in all material aspects and contain no irregularities or deviations from the specifications which would affect the amount of the bid or otherwise give the bidder a competitive advantage. In determining whether a bidder may be deemed responsible, the Board shall request evidence from the bidder concerning:

- A. the experience of the bidder with the service or material being bid;
- B. the financial condition of the bidder;
- C. the conduct and performance of the bidder on previous contracts (with the District or other agencies);
- D. the facilities of the bidder;

- E. the management skills of the bidder; and,
- F. the ability of the bidder to execute the contract properly.

In situations in which the Board has resolved to award a bid to the lowest responsive and responsible bidder, and the apparent low bidder(s) do/does not meet the considerations specified above, the Board shall so notify the bidder(s) in writing, by certified mail, prior to awarding the contract to the next lowest bidder.

Limitations

All purchases that are within the amount contained in the fund level of the appropriation may be made upon the authorization of the Superintendent.

The Treasurer is authorized to adjust appropriations at the fund level in order to make necessary purchases and shall report such modifications at the following regular Board meeting.

Then and Now Certificate

If the Treasurer can certify that both, at the time of the purchase and at the time of certification, sufficient funds were available or in the process of collection to the credit of the respective fund, properly appropriated and free from previous encumbrance, the expenditure may be authorized. The Board may approve such payment within thirty (30) days from receipt of such certificate.

Amounts of less than \$3,000 may be paid by the Treasurer upon completion of the "then and now" certificate, provided that the expenditure is otherwise lawful.

The Board should be advised, for prior approval, of all non-bid purchases when the amount exceeds the amount of the appropriation.

The Superintendent is authorized to make emergency purchases, without prior adjustment, of those goods and/or services needed to keep the schools in operation. Such purchases shall be brought to the Board's attention at the next regular meeting.

"Blanket" Certificates

The Treasurer may issue "blanket" purchase orders (certificates) for a sum not exceeding an amount established by resolution of the Board against any specific line item account over a period of time, not to extend beyond the end of the fiscal year in which it is issued. Only one (1) "blanket" purchase order (certificate) may be outstanding at any one (1) particular time for any one (1) particular line item appropriation.

“Super Blanket” Certificates

The Treasurer may issue “super blanket” purchase orders (certificates) for any amount for expenditures and contracts from a specific line-item appropriation account in a specified fund for most professional services, fuel, oil, food items, and any other specific recurring and reasonably predictable operating expense. Such a purchase order (certificate) shall not extend beyond the fiscal year.

School Bus Purchases

Contracts for the purchase of all school buses and other equipment used in transporting children to and from school must be by competitive bid, pursuant to O.R.C. §3327.08. All bids shall state: “The buses, prior to delivery, will comply with the safety rules of the department of public safety adopted pursuant to O.R.C. §4511.76 and all other pertinent provisions of law.”

Cooperative Purchasing

The Board hereby authorizes the administration to participate in cooperative purchasing programs with other public entities or national or state associations of political subdivisions when authorized by law.

Purchase from the State or Federal Government

The Board may determine to purchase some of the same supplies and services as are purchased by or for agencies of the state or federal government in accordance with O.R.C. §§9.48 and 125.04. If the Board desires to participate in such purchases it will comply with the applicable requirements of the government agencies.

Rejection of Bids or Quotations

The Board reserves the right to reject any or all bids and if it desires to subsequently re-bid the contract.

The bid procedures set forth in this Policy do not apply to the following situations:

1. The acquisition of educational materials used in teaching;
2. If the Board determines and declares by resolution adopted by two-thirds of all its members that an item is available and can be acquired only from a single source.
3. If the Board declares by resolution adopted by two-thirds of all its members that these procedures do not apply to any installation, modification, or remodeling

involved in any energy conservation measure undertaken through an installment payment contract pursuant to Ohio O.R.C §3313.372 or 133.06.

4. The acquisition of computer software for instructional purposes and computer hardware for instructional purposes pursuant to O.R.C. §3313.37.
5. Other situations allowed by the Ohio Revised Code.

Purchase Order Procedures for District Managed Funds

The Board designates the Superintendent as the purchasing agent.

No person may commit the District to a purchase or service without the appropriate certificate of availability of funds (a purchase order). All purchases shall be by purchase order processed through the Treasurer. The purchase order **MUST** be in *place prior to the actual ordering* of the product or service.

*****Individuals not following this procedure will be required to give an explanation to the Board of Education regarding the reason why a purchase order was not in place prior to placing an order or receiving a service. Without Board approval, payment for unauthorized purchases may be the responsibility of the purchaser.***

The Treasurer shall be responsible for encumbering the funds as soon as the requisition has been processed and received in the Treasurer's office.

A verbal financial commitment may be made **ONLY** in cases in which a bone fide emergency exists or when it is impossible or impractical to precede the purchase with a purchase order. Before such a commitment is made, the Superintendent and/or Treasurer shall be contacted for prior approval and for a purchase order number. In all such cases, a requisition shall be issued as soon as possible after the commitment is made.

Confirming purchase order will be honored only in cases cited in the above paragraph.

Open purchase orders for goods or services are valid only for the time period and amount indicated on the purchase order. Extensions of the commitment beyond that time and/or amount shall be confirmed by a new purchase order. Open purchase orders must be approved by the Superintendent and Treasurer before they are issued.

Purchases of contracted services shall be negotiated either verbally, by a "request for proposal", or through the bid process, as determined by the Superintendent. Such services that cost more than \$15,000 annually shall require the approval of the Board.

Capital outlay purchases must have prior approval of the Superintendent and Treasurer.

Capital outlay purchases shall conform to the bidding procedures found in board policy if applicable.

May 1st of each year shall be the annual cut-off date for requisitions to be received in the Treasurer's office unless an emergency exists or the requisition pertains to a Federal Grant (as determined by the Superintendent and/or Treasurer).

Purchase Order Procedures

1. The requester completes the requisition and submits it to the principal / supervisor for review and approval.
2. If approved, the principal / supervisor / building secretary or designee inputs the information into the computer system and sends the original to the Superintendent for approval.
3. If approved, the requisition is sent to the Treasurer for approval and preparation of the purchase order. If not approved, the requisition is returned to the originator.
4. The Treasurer certifies and encumbers the funds, posts the purchase order and distributes the documents as follows:
 - a. White (original) copy of the purchase order is sent to the vendor unless there are specific instructions to the contrary
 - b. Green copy is returned to the building secretary for later use
 - c. Pink copy is filed in the Treasurer's office with the requisition

Payment Procedures

1. When delivery is made, the principal / supervisor / building secretary shall check the green copy of the purchase order to ensure the order has been received correctly and in proper condition.
2. If everything is in order, the green copy of the purchase order is initialed and sent within five (5) working days to the Treasurer's office for payment.

***If invoices/green copy of purchase orders are not received in a timely manner, late payments, fees, and vendor calls shall be the responsibility of the principal / supervisor / building secretary.*

3. The Treasurer's office compares the green copy of the purchase order against the invoice. If everything is in order, payment is issued.
4. If the Treasurer's office finds discrepancies or has questions, the principal / supervisor / building secretary is contacted.
5. The vendor's invoice and the initialed green copy of the purchase order are filed with a copy of the payment voucher.

In the interests of economy, fairness, and efficiency in its business dealings, the Board requires that items commonly used in the various schools or units thereof, be standardized where consistency with educational goals can be maintained.

Purchases NOT permitted

No District employee or corporate entity is permitted to utilize the Board's purchasing ability for his/her own benefit and/or usage.

LEGAL REFS.: O.R.C. §§9.312; 9.48; 125.04; 3313.46; 3327.08

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