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The procurement and purchasing process generally involves (1) budgeting and other planning for expenditures, (2) evaluating needs and identifying general options that would address a need, (3) selecting a method of procurement and following other procurement procedures for a specific purchase or contract, (4) making an actual purchase or entering into a binding procurement-related contract on behalf of the District, and (5) authorizing and making an actual disbursement of funds from the District treasury in order to pay for a purchase or contractual procurement of services, supplies, equipment, or other property.

Assuming an authorized method of procurement has been followed (as established by applicable law and under separate District policies and procedures), this policy focuses on the authority to act as a District purchasing agent by making specific purchases and/or entering into procurement contracts on behalf of the District.

Prior to taking any action that binds the District to an expenditure of funds, the administration shall obtain the School Board's approval of any

1. transaction which involves the District's purchase, lease, or other acquisition of real estate, a building/facility, or some other interest in real estate (such as an easement). Such transactions also generally require authorization by a vote of the electors at an annual or special meeting. (recommend removal of below to procedural manual)

For all procurement transactions that do not require specific, advanced School Board approval under this policy and for which the School Board has not provided any more specific direction, Administrators who have budget-management authority within a particular area may make a final purchase, execute a binding procurement contract that has been reviewed and approved by the Director of Business Services and signed by either the Superintendent or Director of Business Services.

The School Board recognizes that the District's procurement agents have authority under this policy to make certain purchases and to enter into certain procurement contracts on behalf of the District without obtaining specific, advance approval from the School Board – including especially those relatively routine purchases that are within the budget appropriations that have been previously approved by the School Board. Nonetheless, the School Board also expressly encourages the administration to present any procurement decision for specific School Board approval whenever the administration determines that either (1) the procurement decision is particularly important or non-routine, or (2) it would otherwise be in the best interests of the District for the School Board to either approve the transaction or give other specific direction to the administration regarding the transaction. Further, the authority granted to the administration and to District purchasing agents under this policy does not exempt such individuals from being evaluated on their exercise of sound judgment in connection with the use of such authority.

For all purchasing and procurement transactions that are brought to the School Board for advance approval, the administration shall clearly identify the key terms of the transaction and, where appropriate, make a recommendation among any options that are presented. Where the administration has relied on a sole-source procurement exception and is seeking School Board approval of a transaction, the administration shall be prepared to identify for the School Board the reason that sole-source procurement was used and the reason the administration believes that the price and other key terms of the proposed transaction are reasonable.

For purposes of this policy, the purchasing or contractual procurement of supplies, equipment, and other property includes, but is not necessarily limited to, rental or leasing arrangements, licensing, purchases involving the transfer of ownership, and the purchase or acquisition of intangible property such as insurance coverage. The purchasing or contractual procurement of services does not include employment.

No order check, share draft, or other draft or actual disbursement of District funds can be made from the District treasury and the depositories in which the treasury's funds are maintained except in compliance with state law and with the District's policies and procedures governing such disbursements.

Local purchasing will be favored whenever the following factors are equal between local and out-of-town suppliers:

1. Quality of the product
2. Price
3. Conformance to specifications
4. Convenience of delivery
5. The business maintains an office in the District boundary and employs at least one full-time employee.

The School Board reserves the right to prequalify all bidders, agents, or vendors, and to determine whether or not the designation as a local business is met.

The District reserves the right to reject any or all formal bids or informal quotations, to waive technicalities, to make adjustments in specifications or quantities and/or to make selections based on best interest of the school district.

Legal

[Section 66.0135 \[contracts and orders, receipt of invoices, and payments\]](#)

[Section 66.0607 \[withdrawal or disbursement from local treasury\]](#)

[Section 120.10 \[powers of the annual meeting, including authorizing or directing the district to purchase/provide certain property or services\]](#)

[Section 120.16 \[school district treasurer duties, including procedures for disbursements from treasury and funds transfers\]](#)

[2 C.F.R. Part 200 Subpt. D \[post-award requirements under the federal Uniform Guidance\]](#)

[2 C.F.R. §200.318 \[general standards for procurement supported by federal funds\]](#)

[2 C.F.R. §200.319 \[written procurement standards required\]](#)