

Business and Non-Instructional Operations

Purchasing Procedures

The procurement function is one of the major business responsibilities of the Board of Education.-

The duties of purchasing for the Board of Education shall be centralized under the Director of Finance, Management and Operations.

The Director of Finance, Management and Operations shall conduct all purchase transactions for the district, and shall work together with the Town Purchasing Agent in an appropriate manner as prescribed by the Town Charter and ordinances.

The Director of Finance, Management and Operations shall be familiar with and perform all purchasing activities within the limitations prescribed by law, legal opinions, and in accordance with Board of Education policies.

Four fundamental functions for purchasing personnel are as follows:

1. Buy the proper product for the purpose required.
2. Have the product available when needed.
3. Buy the proper amount of the product.
4. Pay the proper price.

Every transaction involving the transfer of property shall be by purchase order or formal contract.

Purchase orders and other purchase obligations shall be signed by the Superintendent or designee. For purchases from Town accounts - such as for capital projects - appropriate Town officials shall sign the purchase order. When required by Town Charter or ordinance, the Mayor shall sign formal contracts.

Specifications governing materials are a joint responsibility of the educational and finance departments. In the procurement of materials, the administration shall ensure that all materials procured will meet the needs of the educational program.

(cf. 3160 - Transfer of Funds Between Categories; Amendments)

Policy adopted: October 8, 2002

HAMDEN PUBLIC SCHOOLS
Hamden, Connecticut

Purchase Order ("PO") procedures for Hamden Board of Education

1. \$500.00 - \$1,999

POs in amounts from \$500.00 - \$1,999.00 require a verbal quotation from three (3) vendors.

POs that are \$1,999 and less require approval by finance director only.

2. \$2,000 - \$49,999

POs in the amounts from \$2,000.00 to \$49,999.00 require three (3) written quotes.

The lowest quote is usually selected. If the lowest quote is not selected, a written explanation is required as to why.

Approval of the Superintendent is required for POs in the \$2,000 - \$49,999 range. In addition, copies of all POs in this range must be sent to the Finance Committee on a monthly basis for informational purposes.

3. \$50,000 and above

For purchases over \$50,000 a formal advertised bid is required.

Finance Committee approval is required for amounts between \$50,000 and \$99,999.

Full Board approval is required for all amounts over \$100,000.

4. Description

All POs must have detailed description of each item, for what location the purchase is intended, the requestor's name, and appropriate back-up documentation.

5. POs that exceed a budget allocation

If a requested PO (for any amount) would exceed the budget allocation for a particular line item, the PO must be returned to the requestor with a note that states that the requested amount is over-budget, and by what amount. The requestor must provide a written explanation as to why the amount is needed to the Superintendent, with a copy to the Finance Committee.

Regulation 3320 (b)

Superintendent approval is then required for over-budget amounts up to \$10,000. Requests that exceed a budget allocation by more than \$10,000 must be approved in advance by the Finance Committee or full Board. Once the PO is approved, it is sent back to the finance department for processing. Emergency expenditures up to \$5,000 may be approved by the Superintendent in accordance with state law, but such expenditures must be announced and approved by the Board at its next regularly scheduled meeting.

- 6.** Each audit year, the Finance Director must report audit status of the previous year to the Finance Committee, in writing, on a monthly basis, beginning with August 1 of the new fiscal year.
- 7.** A written description of all BOE line item budget transfers approved by the Board must be attached to the BOE meeting minutes at which the transfers were approved.
- 8.** A spread sheet showing all BOE transfers and expenditures must be provided to the Legislative Council on a monthly basis, consistent with the Town Charter.
- 9.** The Board of Education Finance Director will work with Town Finance Director on matters of common concern.

Adopted by Hamden Board of Education: March 13, 2007