

## *Ardley Union Free School District*

**Business Office**

**Ardley, NY**

### **Procedures for the Purchase of Commodities, Goods and Equipment**

The purchasing agent, Cheri Rosenblatt, approves all purchase orders. You may not place an order or secure goods or services until you have an approved purchase order. All staff is directed to use Educational Data Services, BOCES bids (bid books are available in all offices), State or County contracts. The OGS (Office of Government Services) may also be used. List the bid number(s) on the requisition(s) in the description box. By utilizing the bid process you are assuring that you will be receiving the best possible price. If the item is not on an approved bid, you must follow the procedures outlined below, provided that the purchasing agent approves the purchase.

#### **Guidelines for Purchasing Services, Supplies, and Equipment when Competitive Bidding is Not Required by Law**

<u>Estimated Amount of Purchase</u>	<u>Procedure/Requirements</u>	<u>Responsibility</u>
Less than \$750	At least two (2) catalog or price sheet comparisons.	Obtained by the originator. The originator will indicate on the purchase requisition form the basis for the determination that the suggested vendor be used.
\$751 - \$1,500	Two (2) verbal quotations, name of vendor and date of quote.	Obtained by the originator. The originator will indicate on the purchase requisition form the basis for the determination that the suggested vendor be used.
\$1,501 - \$4,000	Three (3) verbal or written quotations, name of vendor and date of quote.	Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator.
\$4,001-\$20,000	Three (3) formal written quotations.	Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator.
<i>In excess of \$20,000</i>	<i>Public advertised bids in accordance with general Municipal Law</i>	<i>Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator</i>

## Guidelines for Public Works Projects when Competitive Bidding is Not Required by Law

Estimated Amount of Purchase	Procedure/Requirements	Responsibility
Less than \$2,000	No quotation required.	Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator
\$2,001 - \$35,000	Three (3) formal written quotations	Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator
<i>in excess of \$35,000</i>	<i>Public, advertised bids.</i>	<i>Obtained by the originator who sends it to Accounts Payable Clerk. The Accounts Payable Clerk will review with Business Administrator</i>

### Requisitions:

1. When submitting requisitions, please be sure to use the correct codes.
2. In the description box be as detailed as possible.
3. Remember to list the bid number (state contract number) in the description box or attach quote sheet, if applicable.

### Purchase Orders:

1. Once the Purchasing Agent has approved the requisition, the request will be converted to a Purchase Order.
2. After the conversion to a Purchase Order, the order will be placed.  
**NO ORDERS or ENGAGEMENT FOR SERVICES ARE TO BE PLACED UNTIL THE PURCHASE ORDER HAS BEEN APPROVED.**
4. The Business Office will mail the Purchase Order to the vendor and return two copies to you. One for your files, and one for the requisitioner to sign and return to the Business Office once the goods or services are received and approved payment.
5. Your signature on the Purchase Order receiving copy is a release of payment. The Business Office cannot release a payment without the signed receiving copy and **ORIGINAL** invoice.
6. If you do not want the Purchase Order mailed, please note your instructions in the description box. Provide as much detail as possible to avoid any confusion with the order.  
**For purchase orders that require a fee for shipping, be sure to include 20% for this cost.**
7. We do realize that, at times, some of the encumbrances are estimates and/or there may be changes due to shipping and handling. If this occurs, a new requisition must be created and your account will be charged.

### New Vendors:

1. All requests for the addition of a vendor must be in writing.
2. Vendor addition request forms may be found on the District's website <http://ardsleyschools.org>
3. Please clearly list the vendor's name, address, and phone/fax number.
4. List the purpose.
5. The Business Office may be able to guide you to existing vendors for your purchase.
6. All new vendors complete and return a W9 before any payment is released. The District is required by law to have a federal ID number on file.

*Ardsley Union Free School District Business  
Office  
Ardsley, NY*

**Request for Quotation**

ITEM(S) REQUESTED: \_\_\_\_\_

VENDOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ FAX# \_\_\_\_\_

DATE QUOTE RECEIVED: \_\_\_\_\_ QUOTE AMOUNT: \_\_\_\_\_ WRITTEN OR VERBAL (circle one)

COMMENTS: \_\_\_\_\_

VENDOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ FAX# \_\_\_\_\_

DATE QUOTE RECEIVED: \_\_\_\_\_ QUOTE AMOUNT: \_\_\_\_\_ WRITTEN OR VERBAL (circle one)

COMMENTS: \_\_\_\_\_

VENDOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ FAX# \_\_\_\_\_

DATE QUOTE RECEIVED: \_\_\_\_\_ QUOTE AMOUNT: \_\_\_\_\_ WRITTEN OR VERBAL (circle one)

COMMENTS: \_\_\_\_\_

Quote Awarded to: \_\_\_\_\_

Requestor's Signature: \_\_\_\_\_