

PURCHASING POLICY

LEARN's purchasing policy and procedures are intended to comply with state and federal laws and regulations, applicable case law, and the Uniform Commercial Code (UCC). In addition, purchases involving federal funds shall comply with C.F.R. Sections 200.318-200.326. Other LEARN policies which are integral to the purchasing function include Relations with Vendors (3301) and Conflicts of Interest (4158/4258/9317).

The following objectives form the basis for the purchasing function:

- Buy the proper product for the purpose required;
- Have the product available when needed;
- Buy the proper amount of the product; and
- Pay the proper price.

The following guidelines apply to purchases of materials and services, subject to exclusions below:

- Micro-purchases under \$20,000 may be made without soliciting competitive quotes if LEARN considers the price to be reasonable, based on review or industry knowledge. To the extent practicable, micro-purchases should be distributed among qualified suppliers.
- Small purchases \$20,000 and higher, but less than \$50,000 require documented quotes from an "adequate" number of sources (generally, three).
- Large purchases \$50,000 and higher require competitive bidding through sealed bid (lowest price); competitive proposal (RFP/RFQ – best fit for need); or, under limited and approved circumstances, a sole source provider.
- Any purchases of \$250,000 and higher must be separately reviewed for compliance with Federal funding regulations, including C.F.R. Sections 200.322-323.

Purchasing thresholds pertain to the full amount of a purchasing agreement, not an individual purchase. Where an agreement relates to more than one fiscal year, the full amount of the contract shall apply. Small and large purchases under \$250,000 may be sourced under a competitively bid contract through a third party such as CT State Dept. of Administrative Services, an agency such as NASPO, or purchasing cooperatives or consortia such as PEPPM, Omnia and RESC-based cooperatives.

The Executive Director is authorized to set appropriate specifications for a contract or agreement to purchase. Solicitations will clearly describe the materials or services being requested; outline minimum standards and expectations; and identify requirements and criteria for evaluating bids. Bid solicitations will be made in a public manner, without regard to supplier's location or prequalification. LEARN is committed to providing equal opportunities to certified Small, Minority & Women-owned businesses for procurement of goods and services.

Bid or quote awards shall be made in the best interests of LEARN and may not necessarily be the lowest bid or quote. Other factors to be carefully considered are quality, suitability and

delivery terms. The Executive Director may award bids and may reject any or all such bids. All bid awards shall be reported to the Executive Committee of the Board.

LEARN is responsible, in accordance with good administrative practice and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to, bid evaluation, protests, disputes, and claims.

Bidding and quote requirements may be waived by the Executive Committee if it is in the best interest of LEARN to do so. Any decision to waive bid or quote requirements will be reported in the Executive Committee minutes.

The authority to enter into and sign contracts is delegated to the Executive Director by the Board. General purchasing procedures for LEARN will be centralized under the Chief Financial Officer, as designee for the Executive Director.

Bids and quotes are not required for the following:

- Purchases where only one supplier exists, if approved by the Executive Director.
- Architectural services.
- Legal services.
- Services requiring specific expertise (consultants, specialists).
- Textbook purchases.

Policy Adopted: March 8, 1990

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LEARN