

LEARN

PURCHASING MATRIX:

SIZE OF PURCHASE	DOLLAR RANGE	REQUIREMENTS	DOCUMENTATION
MICRO-PURCHASES	Under \$20,000	“Reasonable price” based on review or industry knowledge. Documented quotes not required. To the extent practicable, micro-purchases should be distributed equitably among qualified suppliers.	It is a good practice to note in the requisition what resources were reviewed to establish reasonable pricing (for instance, based on review of online pricing at other vendors).
SMALL PURCHASES	\$20,000 or higher, but less than \$50,000  (LEARN limit per Board policy.)	Documented price or rate quote from adequate number of sources, generally three. Competitively bid contract, cooperative or consortium pricing may be used.	Requisition should reference other vendors considered or clearly identify which contract/coop/ consortium is used. Copies of quotes not chosen may be requested by Business Office.
LARGE PURCHASES	\$50,000 or higher  (LEARN limit per Board policy. New Federal limit is \$250,000.)	Three options for purchase: (a) Sealed Bid – lowest price takes priority. (b) Competitive proposal (RFP/RFQ) – most advantageous source based on documented evaluation criteria. Competitively bid contract, cooperative or consortium pricing may be used if matching needed materials or services. (c) Sole source – item/service is only available from one source, or funding agency gives approval upon written request, or under exigent circumstances.  * Approval from funding agency is REQUIRED for purchases \$250,000 and higher.	Business Office to retain copies of bid documents, summary of submissions, evaluation reviews and final award decisions. Sole source documentation is expected to be thorough and objective. Requisition should include adequate documentation to describe decision-making and final award.  LEARN policy allows Executive Committee to waive bid requirements with adequate support. Waivers will be reported in meeting minutes.
<p>Per Board policy, bids and quotes are <u>not</u> required for the following:</p> <ul style="list-style-type: none"> <li>• Purchases where only one supplier exists, if approved by the Executive Director.</li> <li>• Architectural services.</li> <li>• Legal services.</li> <li>• Services requiring specific expertise (consultants, specialists).</li> <li>• Textbook purchases.</li> </ul>			

*Sample Invitation to Bid:*

**LEARN**  
Regional Educational Service Center  
44 Hatchetts Hill Road, Old Lyme CT 06371

INVITATION TO BID

LEARN is accepting proposals for:

[DESCRIPTION] at

- [LOCATION 1]
- [LOCATION 2]
- [LOCATION 3] ETC.

Sealed bids for the proposal named above will be received until [\_\_\_\_\_ a.m./p.m.] on [DAY, DATE AND YEAR] at the office of the Executive Director, 44 Hatchetts Hill Road, Old Lyme, CT 06371. Thereafter, proposals will be opened publicly and recorded as read.

All proposals shall be made in the form specified in the Request for Proposal.

[IF APPLICABLE TO RFP, INSERT MANDATORY PRE-BID INFORMATION]

For copies of the RFP and associated documents, please go to the LEARN webpage at [www.learn.k12.ct.us/requestforproposals](http://www.learn.k12.ct.us/requestforproposals).

*RFP Standard Instructions:*

**LEARN**  
**Regional Education Service Center**  
**REQUEST FOR PROPOSAL**  
**STANDARD INSTRUCTIONS**

**[DESCRIPTION OF RFP]**  
**FOR [LOCATION(S)]**  
**[DATE]**

1. INTRODUCTION

LEARN is soliciting proposals for the above named project. If there are any conflicts between the instructions in these Standard Instructions and any other proposal document(s), these Standard Instructions shall prevail.

2. KEY EVENT DATES

Advertisement of Request for Proposals	[DATE]
Mandatory Pre-bid Conference	[TIME AND DATE]
Public Proposal Opening	[TIME AND DATE]
Proposal Awarded (On or About)	[DATE]
Commencement of Work	Upon Notice of Award

3. OBTAINING PROPOSAL DOCUMENTS

Specifications and proposal documents may be obtained from LEARN’s website at [www.learn.k12.ct.us/requestforproposals](http://www.learn.k12.ct.us/requestforproposals).

4. PROPOSAL SUBMISSION INSTRUCTIONS

- a. One (1) original and three (3) copies of all proposals must be submitted in a sealed envelope clearly marked “[DESCRIPTION OF RFP]”. If forwarded by mail or courier, the sealed envelope must be addressed to "Chief Financial Officer”, LEARN, 44 Hatchetts Hill Road, Old Lyme, Connecticut 06371. Proposals must be stamped at 44 Hatchetts Hill Road by the time of the Public Proposal Opening date noticed in Section 2 titled Key Event Dates. Postmarks are NOT an acceptable waiver of this policy.
- b. Emailed and/or faxed proposals will not be accepted. Late bids will not be opened. Corrections and/or modifications received after the first proposal is publicly opened will NOT be accepted
- c. Valid proposals must include completed Appendixes A through F, along with a minimum of three references (Appendix G).
- d. All information must be submitted in ink or typewritten. Mistakes may be crossed out

and corrections inserted. Corrections must be initialed by the person signing the proposal.

- e. Proposals are considered valid for ninety (90) days after proposal(s) are opened. Proposers may not withdraw, cancel or modify their proposal for a period of ninety (90) days after proposal(s) are opened.
- f. Proposals must be signed by an authorized person representing the legal entity of the firm submitting the proposal.
- g. The inability to meet any specified requirements(s) must be stated in writing and attached to the proposal form, or written on the proposal form.
- h. Addenda or other clarifying information may be issued and will be posted to LEARN's website prior to the bid closing date. It is the responsibility of the proposer to check LEARN's website for updated information. All proposals must comply with the most recent updates at the time of submission.

5. PRESUMPTION OF PROPOSER BEING FULLY INFORMED

At the time the first proposal is opened, each proposer is presumed to have read and be thoroughly familiar with all proposal and contract documents for this project, and has performed an on-site inspection of the work location. Failure or omission of the proposer to receive or examine any information shall in no way relieve any proposer from obligations with respect to their proposal.

6. INTERPRETATION OF ACCEPTABLE WORK

The specifications, proposal and contract documents are to be interpreted as meaning those acceptable to LEARN. Any substantive changes or interpretations will be issued by LEARN in writing as an addendum.

7. TAX EXEMPTIONS

LEARN is exempt from Federal Excise taxes and Connecticut Sales and Use taxes. Firms shall avail themselves of these exemptions.

8. INSURANCE (1)

The firm awarded this proposal must provide a current Certificate of Insurance to the Chief Financial Officer PRIOR to commencement of work, with the following requirements:

- a. General liability coverage limits for bodily injury, property damage, and personal injury, \$1,000,000 per occurrence/\$2,000,000 general aggregate
- b. Auto liability limits for property damage and bodily injury caused by the operation of motor vehicles, \$1,000,000 per occurrence
- c. Contractual liability, \$1,000,000 per occurrence
- d. Professional liability Insurance, \$1,000,000 per claim/\$1,000,000 annual aggregate, when professional services are being provided
- e. Owner's, Contractors Protective Liability (OCP) \$1,000,000 per occurrence, when required by LEARN.

- f. Worker's Compensation, as required by Connecticut State statute
- g. "LEARN" is to appear as an additional insured on all Certificates of Insurance for general liability and auto liability coverage.
- h. All insurance is to be provided by carriers authorized to issue such insurance in the State of Connecticut, and rated at least A-/VIII by A.M. Best. Exceptions are subject to the sole discretion of LEARN.
- i. Insurance may not be canceled or modified without sixty (60) days written notice by registered U.S. Mail to "CFO, LEARN, 44 Hatchetts Hill Road, Old Lyme, Connecticut 06371".

*(1) Coverage requirements may be modified according to the final scope of work.*

#### FAIR EMPLOYMENT PRACTICES

The Proposer agrees not to discriminate against any employee or applicant for employment in the performance of this proposal's work with respect to hire, tenure, terms, conditions, or privileges of employment due to race, sex, age, religion, national origin, or other condition proscribed by State or Federal law.

#### 9. AWARDING THE PROPOSAL

The project will be awarded based on pricing; location and/or proximity of services; and LEARN's assessment of the Bidder's ability to perform. LEARN reserves the right to accept or reject, any, all, or any part of proposals, to waive formalities or informalities, and to make an award that is deemed to be in the best interests of LEARN.

LEARN reserves the right not to award the continuation of a multiple year bid. The award of each year's contract is contingent upon adoption and approval of budgetary funds for this purpose.

LEARN reserves the right to cancel the contract at any time, for any or no reason. If the cancellation is for inadequate performance, then the cancellation shall be immediate. If the cancellation is for budgetary considerations or other discretionary considerations, then the cancellation shall be upon thirty (30) days written notice. In the event of cancellation of the contract, all amounts due and owing shall be adjusted to the effective date of the termination.

### **END OF STANDARD INSTRUCTIONS**

*Sample Bid Waiver Request:*

**BID WAIVER REQUEST**

WAIVER FOR:

DATE OF REQUEST:

FISCAL YEAR OF PURCHASE OR SERVICES:

DEPARTMENT/SCHOOL PROGRAM BUDGET CODE:

SUPERVISOR OF PROGRAM:

MATERIALS OR SERVICES TO BE PROVIDED:

RECOMMENDED VENDOR/CONTRACTOR:

COST OF REQUEST:

BID WAIVER REQUEST RATIONALE:

RECOMMENDED BY: DATE \_\_\_\_\_

Bid Tabulation Summary LEARN  
(Product/Service)

VENDORS	ITEMS FOR BID	BID PRICE
		-

Bid Opening Time: \_\_\_\_\_

Bid Opening Date: \_\_\_\_\_

Witness: \_\_\_\_\_

Witness=-----,-----

LEARN  
P.O. BOX 085  
44 Hatchetts Hill Road  
Old Lyme, CT 06371

BID AWARD

PROGRAM/BUILDING \_\_\_\_\_ BUDGET COI:>E\_\_\_\_\_

SUPERVISOR OF PROGRAM \_\_\_\_\_

KIND OF MATERIAL \_\_\_\_\_  
\_\_\_\_\_

FUNDS ALLOCATED IN OFFICIAL BUDGET \_\_\_\_\_

COSTS NOT ALLOCATED IN OFFICIAL BUDGET \_\_\_\_\_

WHERE WILL UNALLOCATED FUNDS COME FROM \_\_\_\_\_

IF RECOMMENDED BID AWARD IS TO OTHER THAN THE LOW BIDDER, PLEASE GIVE RATIONALE:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RECOMMENDED BY \_\_\_\_\_ DATE \_\_\_\_\_