Board Policy DJE: Purchasing

Status: DRAFT

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A. SCOPE AND AUTHORITY

The Henry County Board of Education recognizes its fiduciary responsibility to oversee the prudent expenditure of district funds and ensure that all purchases are made in the best interest of Henry County Schools. The Henry County Board of Education has delegated purchasing power, up to a defined limit, to the Superintendent and grants the Superintendent authority to further delegate subject to the limitations set forth in this policy. Through the Superintendent and his/her designees, the Henry County Board of Education will ensure purchases support the efficient and effective operation of the school system.

Purchases are defined as the procurement of supplies, materials, equipment and nutritional items (collectively "Goods"), procurement of services for the construction, alteration or repair of any buildings ("Construction and Repair"), and the procurement of technology or other services ("Other Services"). Purchasing does not include Employee Reimbursement for travel related costs incurred in the performance of official duties of Henry County Schools.

All purchases, leases, and/or associated contracts shall be awarded contingent upon an appropriation of funds having been made and covered by unrestricted cash balances in the appropriate fund account. All purchases shall be in accordance with the policies of the Henry County Board of Education and State Board of Education, and in compliance with state and federal laws. Any purchase made contrary to this policy shall be null and void and the Board shall not be bound thereby.

B. PURCHASING REQUIREMENTS: LIMITS, APPROVALS & SOLICITATIONS

All purchases shall be based upon the acquisition of goods and services determined to be in the best interest of the school system. Purchasing will be conducted under the administration of the Superintendent and Chief Officer of Business & Financial Services, who will designate a staff member to supervise all employees assigned to the Purchasing Department and their job activities. Specifically, the District shall make purchases that are consistent with the purchasing principles of:

- Acceptable quality and best fit;
- Transparency in use of public funds;
- Protection against conflict of interest;
- Maximization of competition;
- Equal and fair competition; and
- Legal/regulatory compliance

1. Requisitions and Expenditures

   It shall be the policy of the Board of Education that all purchasing activity begin with a requisition. However, nothing shall limit the Superintendent or his/her designee from making purchases without a requisition when necessary under the circumstances, in the discretion of the Superintendent.

   All requisitions must be approved by the designated District official and apply the appropriate solicitation method based on the total anticipated expenditure for the Goods, Construction and Repair, and Other Services as follows:

Expenditure Range	Approval Required	Solicitation Method
$0 - $4,999.99	Principal / Department designee (Manager role and above)	Discretion advised; Multiple quotes not required but recommended.

$5,000 - $9,999.99	Principal / Department designee (Coordinator role and above)	The School or Department is responsible for solicitation of two or more written quotations (via phone, fax, or email). Evidence of requisition approval and quotation should be retained; Schools/Departments shall leverage templates provided by the Purchasing Department.
$10,000 - $24,999.99	Principal / Department designee (Director role and above)	The School or Department is responsible for solicitation of two or more written quotations (via phone, fax, or email). Evidence of requisition approval and quotation should be retained; Schools/Departments shall leverage templates provided by the Purchasing Department.
$25,000 - $49,999.99	**School:** Principal and Asst. Superintendent **District office:** Department designee (Assistant Superintendent or Executive Director role and above)	The School or Department is responsible for solicitation of three or more written supplier quotations. Evidence of requisition approval and quotation should be retained; Schools/Departments shall leverage templates provided by the Purchasing Department.
$50,000 - $99,999.99	**School:** Principal, Asst. Superintendent, and Superintendent or his/her designee **District office:** Department designee (Director role and above), and Superintendent or his/her designee (e.g. Division Chief)	For non-capital project procurements, the Purchasing Department is responsible to guide the requesting Department through the selection and execution of a solicitation method, focused on either the lowest price, provided by a responsive and responsible bidder, or one focused on best value. It is expected that at least three suppliers will be solicited. The Purchasing Department will maintain evidence of procurement procedures. For capital project procurements, the requesting Department is responsible for the solicitation procedures in coordination with the Purchasing Department. The requesting Department may leverage templates and platforms provided by the Purchasing Department and will provide evidence of solicitation result to the purchasing Department.
$100,000 and above	**Henry County Board of Education**	The solicitation method outlined for purchases at or greater than $50,000 applies. In the event of multiple purchases relating to a distinct Board approved project, an exception to discrete Board review and approval of each planned expenditures exceeding $100,000 is permissible when all of the below conditions are true: ▪ The Board has appropriated funding for the defined project. ▪ The Board receives and reviews financial reporting that summarizes progress by the defined project.

2. Purchasers will obtain the minimum number of solicitations stipulated. In the event the minimums cannot be secured, purchases may be made with written justification detailing the circumstances limiting competition.

3. No purchase shall be approved by the person generating the request for the purchase. At a

minimum, it is expected that approval will be obtained from a requestor's supervisor.

4. Purchases must not be split to circumvent the above limits. A "split purchase" occurs when a single purchase is divided into two or more transactions and/or purchase orders to circumvent defined purchasing limits. The total anticipated expenditure regarding the purchase should be considered to identify the appropriate approval requirements and solicitation method.

5. Except for in circumstances where the Superintendent believes, in his or her discretion, that the circumstances or need of the purchase do not allow for it, all purchase requests shall be approved prior to entry into the financial system. The Purchasing Department will review system requisitions, generate purchase orders, and support distribution of purchase orders to vendors. It is expected that all purchases shall be made by formal contract, purchase order or shall be accompanied by a receipt.

C. COMPETITIVE BIDDING REQUIREMENTS

Competitive bidding requirements are achieved through completion of the solicitation method prescribed in Section B, according to the expenditure level threshold. The Henry County Board of Education directs the Superintendent to ensure local, minority-owned, women-owned, and/or small business enterprises (collectively L/M/W/SBEs) have clarity on how to pursue business opportunities with Henry County Schools.

Exceptions to requirements for written quotations or competitive bids may apply to the following items and situations.

1. Continuance of an existing purchasing agreement, rent, lease, or previously authorized purchase order.

2. Instructional resources, periodicals, library resources, software, digital subscriptions, and reference materials,

3. Tests, test development and/or test scoring services from a publisher or testing company.

4. Agreements for maintenance service from the original vendor or authorized agent of the installed equipment or products.

5. Purchases made directly from other governmental sources, such as state bid contracts, or cooperative purchasing agreements issued by national and regional cooperatives.

6. Additional purchases of the same or like equipment, material, supplies, services, rentals or leases previously bid.

7. Purchases from an only known source of supply, provided supporting documentation has been submitted with the requisition.

8. Where, in the discretion of the Superintendent, the circumstances of, or the need for, any particular purchase do not allow for adherence to the procedures and/or requirements set forth in this policy, the Superintendent is hereby given specific authority to approve any such purchase without strict adherence to this policy, but only to the extent necessary to meet a particular need or set of circumstances. For all purchases made pursuant to this exception, the need or circumstances that require deviation from this policy shall be documented. For purchases greater than $100,000, the need for the purchase shall be critical to the operations of the School System, Board Members shall be notified of the purchase as soon as is feasible under the circumstances, and the purchase shall be ratified by the Board at its next regularly scheduled meeting

9. Unless otherwise required by applicable law, representation, counsel or advice from licensed professionals as deemed necessary by the Board, the Superintendent, or the Superintendent's designee, including without limitation legal or financial representation on an ongoing basis.

10. Purchases, from time to time, by the Board, the Superintendent, or the Superintendent's designee, of services, which are limited to those defined by statute as a "profession" or "professional service".

Examples of professional services include: accountants, actuaries, appraisers, architects, attorneys, auditors, brokerage firms, business consultants, educational consultants, engineers, financial advisors, land surveyors, landscape architects, mental health professional, occupational therapists, physical therapists, physicians, program managers, psychologists, public relations professional, recruiters, researchers, real estate appraisers, real estate brokers, speech-language pathologists, software engineers, translators, web designers, and members of state- regulated professions. Contracts for these professional services shall be made on the basis of demonstrated competence and qualifications to perform the services and for a fair and reasonable price.

Documentation outlining the qualifying scenario shall be maintained for all purchases completed under the defined competitive bidding exceptions.

D. **PAYMENT METHOD AUTHORIZATION**
Payment for purchases will be completed via District/School issued checks, procurement cards, or other approved banking methods (e.g., Electronic Fund Transfers).

E. **ADMINISTRATIVE REGULATION AUTHORIZATION**
The Superintendent is authorized to adopt any administrative regulations and internal office procedures necessary to implement this policy.