

Wallingford-Swarthmore School District

PROCUREMENT MANUAL



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PROCUREMENT MANUAL

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INTRODUCTION

The purpose of procurement is to strategically acquire goods and services that enable organizations to operate efficiently, reduce costs, and build strong supplier relationships. At Wallingford-Swarthmore School District, this process is being implemented to ensure all local, state and federal funds are expended in accordance with State and Federal requirements, Wallingford-Swarthmore School District Board policies, annual budgetary limitations and continuous fiscal responsibility and transparency.

Effective procurement is a cooperative venture between the Business Office, school buildings, and other departments within the District. The purpose of this manual is to provide guidelines and procedures for administrators, staff and other stakeholders throughout the District.

This manual is designed to provide staff and stakeholders with a clear, detailed overview of procurement mandates and thresholds, the different types of procurement, distinction between the roles and responsibilities of the Business Office and budget managers, contract submission and approval guidelines, expected approval timelines, and steps to efficiently reviewing and managing individual department or building budgets. The district policy that governs this process is Policy 610 (Procurement) and Policy 610-AR.

POLICY 610 - PROCUREMENT

Purpose

The purpose of this Policy is to implement a system of procurement which ensures that public funds are expended within budgetary limitations and in accordance with law, and that competitive bids or price quotations for products and services are obtained where required by law.

Delegation of Responsibility

The Board delegates to the Business Administrator or designee the responsibility of establishing and implementing a procurement framework, as outlined in the accompanying Administrative Regulations, consistent with the guidelines below, that will achieve the objective of securing those items necessary for the operation of the District in a cost-effective and expeditious manner that complies with applicable law and Board Policy.

The Board grants to the Business Administrator the authority to purchase supplies and award contracts for construction, reconstruction, repairs, or work of any nature to the extent permitted by applicable law and Board Policy.

Guidelines

All expenditures submitted by the administration to the Board for approval shall have been reviewed and approved by the administration in accordance with standard District practices and procedures.

When required by law or Board Policy, invitations for bids or solicitations shall be prepared by, and bids will be opened publicly by the Business Administrator or designee. Bid specifications shall provide for alternates when possible and appropriate. Like items shall be combined if possible and permissible under applicable law.

The Business Administrator or designee is authorized to obtain competitive bids or price quotations when not required by law, but, where in the judgment of the Business Administrator or designee, obtaining such bids or quotations may result in monetary savings to the District or is otherwise determined to be in the District's best interests.

The Board prohibits the practice of splitting purchases to avoid advertising and bidding requirements.[\[1\]\[2\]](#)

With kind, quality and material being equal, the bid of the lowest responsible bidder meeting bid specifications shall be accepted upon resolution of the Board, unless the Board chooses to reject all bids.

The Board recognizes that emergencies may occur when imminent danger exists to persons, property or regular District operations, where bidding cannot be accomplished because of the need for immediate action. Bidding decisions in the event of such emergencies shall be made in accordance with existing legal requirements.[\[1\]](#)

Cooperative Purchasing

The Business Administrator or designee may negotiate appropriate cooperative purchase agreements with other political subdivisions, in accordance with law and Board Policy, and where appropriate, make purchases through state and/or previously negotiated cooperative purchase agreements and/or programs.

Cooperative purchasing agreements must specify the items listed below, and are subject to Board approval:

1. Categories of equipment or supplies to be purchased;
2. Manner of advertising for bids and awarding contracts;
3. Method of payment by each participating party; and/or
4. Other matters necessary to carry out the purposes of the agreement.

All such agreements must conform to relevant provisions of the School Code.

Electronic Bidding

The Board permits the receipt of bids electronically for competitive contracts, in compliance with applicable laws and Board Policy.[\[3\]](#)[\[4\]](#)

The District shall ensure that until the bid opening, no electronic bid is accessed or accessible by anyone other than the firm submitting the bid.[\[4\]](#)

Competitive Electronic Auction Bidding

The Board permits the use of competitive electronic auction bidding, in compliance with applicable laws and Board Policy.

During the auction, bidders shall be able to review their bid rank or the low bid price, and may reduce their bid prices during the auction.

At the conclusion of the auction, the record of the bid prices received and the name of each bidder shall be open to public inspection.

After the auction period has expired, the District shall grant in writing withdrawal of a bid when the bidder requests relief and presents credible evidence of a clerical mistake due to reasons permitted by law, within the time period established by the District.

The contract shall be awarded within sixty (60) days of the auction by written notice to the lowest responsible bidder, or all bids may be rejected. Extensions of the award date may be made by written, mutual consent of both parties.

POLICY 610 - ADMINISTRATIVE REGULATIONS

Note: The dollar thresholds referenced below refer to the Pennsylvania Department of Labor and Industry's Final Adjusted Base Amounts (FAA) that are updated annually, effective January 1. For calendar year 2026, purchases and contracts below \$13,200 require no formal bidding, those between \$13,200 and \$24,500 require three written/telephonic quotations, and those over \$24,500 require formal bidding.

General Purchasing Procedures

Every purchase made on behalf of the District shall be made pursuant to an approved purchasing document, except any purchases made pursuant to established petty cash procedures. No orders for goods or services shall be made prior to appropriate purchasing approval, except in emergency situations that pose an immediate threat to the health or safety of occupants of District facilities or to protect the District from substantial legal exposure. All purchases shall be governed by the budget.

All purchase order requests shall be referred to the Business Administrator or designee, who shall check whether the proposed purchase is subject to bid, whether sufficient funds exist in the budget, and whether the materials sought to be purchased might be available elsewhere in the District.

In accordance with Board Policy, the Business Administrator is authorized to approve all purchases that are contemplated within the budget and within budgetary limits, up to the formal bidding threshold, as referenced above. If the contemplated purchase exceeds the formal bidding threshold, prior Board approval is required.

When funds are not available or budgeted for a proposed expenditure, a legal transfer from one class of expenditure to another may be made by the Board in the last nine (9) months of the fiscal year if it is apparent that necessary surplus funds exist in another appropriation, the procedures specified in the School Code are followed, and it can be demonstrated that the proposed expenditure would be educationally warranted in the current fiscal year.

In the event of emergency, the Superintendent or Business Administrator may authorize a purchase. Any expenditure in excess of budgetary appropriations made in accordance with this provision shall be reported to the Board at the next public meeting, with a recommendation of funds to be transferred to cover said purchase.

Soliciting Prices (Bids and Quotations) – Furniture, Equipment, Supplies and Appliances

All purchases of and contracts for furniture, equipment, supplies and appliances for the use in schools which equal or exceed the formal bidding threshold referenced above shall be based on competitive bids, unless exempt by statute.

When not based on competitive bids, furniture, equipment, supplies and appliances to be purchased by the District, unless exempt by statute, may be made based on written or telephonic price quotations when the cost of such purchases falls within the annual range of purchases that require three written/telephonic quotations. Price quotations from at least

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three (3) qualified and responsible vendors shall be requested. If it is not practicable to obtain three (3) price quotations, a memo must be kept on file for three (3) years showing that fewer than three (3) qualified contractors exist in the market area within which it is practicable to obtain quotations. The memo shall contain, at a minimum, the following:

1. Date of quotation;
2. Name of vendor and vendor's representative;
3. The items which were the subject of the quotation; and
4. Price of the items.

Where competitive bidding is required, the Business Administrator or designee shall arrange for the advertisement of the bid requests once a week for three (3) weeks in not less than two (2) newspapers of general circulation, as required by law.

The following items are exempt from the above provisions: maps, music, globes, charts, educational films, filmstrips, prepared transparencies and slides, pre-recorded magnetic tapes and disc recordings, textbooks, games, toys, prepared kits, flannel board materials, flash cards, models, projectuals and teacher demonstration devices necessary for school use.

Soliciting Prices (Bids and Quotations) – Construction, Reconstruction, Repairs, Maintenance or Work on School Buildings/Property

All contracts for construction, reconstruction, repairs, maintenance or work on any school building or property, including the introduction of plumbing, heating and ventilating, or lighting systems where the cost equals or exceeds the formal bidding threshold shall be done under separate contracts to be entered into with the lowest responsible bidder, upon proper terms, after due public notice asking for competitive bids, unless exempt by statute.

In the event that an emergency occurs causing a school plant or any part thereof to become unusable where proceeding with the repairs/replacement would otherwise require public competitive bidding, competitive bids for such repairs or replacement may instead be solicited from at least three (3) responsible bidders, and, upon the approval of any of these bids by the Board, the District may proceed at once to make the necessary repairs or replacements in accordance with the terms of the approved bid(s). The Business Administrator or designee shall notify the Secretary of Education that an emergency has occurred and that a bid has been selected under the emergency process permitted by law.

When not based on competitive bids, all contracts for construction, reconstruction, repairs, maintenance or work on any school building or property, including the introduction of plumbing, heating and ventilating, or lighting systems may be made based on written or telephonic price quotations when the cost of such contracts falls within the annual range of purchases that require three written/telephonic quotations, unless exempt by statute. If it is not practical to obtain three (3) price quotations, a memo must be kept on file for three (3) years showing that fewer than three (3) qualified contractors exist in the market area within

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which it is practicable to obtain quotations. The memo shall contain, at a minimum, the following:

1. Date of quotation;
2. Name of contractor and contractor's representative;
3. The construction, reconstruction, repair, maintenance or work which was the subject of the quotation; and (4) price.
4. Where competitive bidding is required, the Business Administrator or designee shall arrange for the advertisement of the bid requests once a week for three (3) weeks in not less than two (2) newspapers of general circulation, as required by law.

Any construction, reconstruction, repairs, or work of any nature where the entire cost or value, including labor and material, is less than the annual threshold for which three written/telephonic quotes are required may be performed by the District's own staff. Additionally, the District's maintenance or other staff may perform maintenance work on behalf of the District, irrespective of the cost or value of such work.

Award of Contracts

When competitive bidding is required by law, the award of open-market orders or contracts shall be to the lowest responsible, qualified bidder, kind, quality, and material being equal, with consideration being given, to the extent permitted by law, to the qualities of the article to be supplied, their conformity with the specifications, their suitability to the requirements of the educational system, the delivery terms, and the past performance of vendors.

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WSSD CONTRACT GUIDELINES

1. When applicable by law or most fiscally beneficial to the District, all purchases and/or contractual agreements will be subjected to the procurement process.
2. Contracts and/or agreements are only authorized to be signed by the Board President, Business Administrator or the Procurement Coordinator.
3. Vendors providing goods or services prior to a fully executed and Board approved contract or signed purchase order are prohibited, unless an emergency arises, which will be determined by the Superintendent and/or Business Administrator.
4. It is recommended to engage the Business Office, at a minimum, three months prior to the need of goods or services. This proactive approach will allow adequate time to complete the mandated procurement process, when applicable, and/or allow the District to engage in cost-effective or cost-savings negotiations or solicitations.
5. Contracts exempt from the formal procurement process and presentation to the Finance Committee are as follows:
 - a. Board approved field trips
 - b. Education service agreements
 - c. Student Activity expenditures
 - d. Out-of-district placements
 - e. Professional service agreements associated with Board approved donations
6. Directors or Principals must complete the Procurement Specifications Form (Appendix A), which would allow the Business Office to determine if procurement is mandated or beneficial and the type of procurement that is required or most appropriate.
7. Any contract to be considered for Board approval must be sent to the Procurement Coordinator. The Procurement Coordinator is only District personnel authorized to submit contracts, of any kind, for legal review. This process aims to streamline communication and turnaround time.
8. When possible and/or most appropriate, the District's contract templates will be used; however, the Procurement Coordinator will still review and negotiate contracts provided by vendors.

PROCUREMENT THRESHOLDS

As a public school district within the Commonwealth of Pennsylvania, Wallingford-Swarthmore School District must comply with Public School Code. Pennsylvania school districts must comply with whatever is more stringent of the State or Federal laws.

Thresholds are determined each year by **Section 807.1** of the Public School Code establishing the legal requirements to follow in the purchase of materials, supplies, and equipment for use in public schools in the Commonwealth.

As of **Jan 1, 2026*** State Guidelines are as follows:

- Goods **below \$13,200** require no formal bidding
- Goods **between \$13,200 and \$24,500** require **three** quotes from at least **three** qualified and responsible vendors
- Goods **over \$24,500** require a competitive sealed bid.

IMPORTANT: There are **exceptions** to the bidding rules including professional services, outsourcing, energy, textbooks, and classroom supplies. While exceptions exist, the District should always do what it deems is fiscally responsible.

As of **Oct 1, 2025*** Federal (Uniform) Guidelines are as follows:

- Procurements valued at or **below \$15,000** may be awarded without soliciting price or rate quotations for grant-funded procurements
- Purchases **between \$15,000 - \$350,000** require grantees to conduct informal procedures, consisting of solicitation of price or rate quotations (“bids”)*
- Purchases **over \$350,000** require a formal competitive process, which would begin with a Request for Proposal or Invitation for Bids

IMPORTANT: Purchasing amount thresholds apply to the District. The total spend must include all predictable products, district-wide, for the entire fiscal year. Examples include copy paper, technology items, supplies, custodial supplies and furniture.

***Please note State and Federal thresholds are updated annually; therefore, District policy and this manual will be updated regularly.**

PA SCHOOL CODE PROCUREMENT REQUIREMENTS

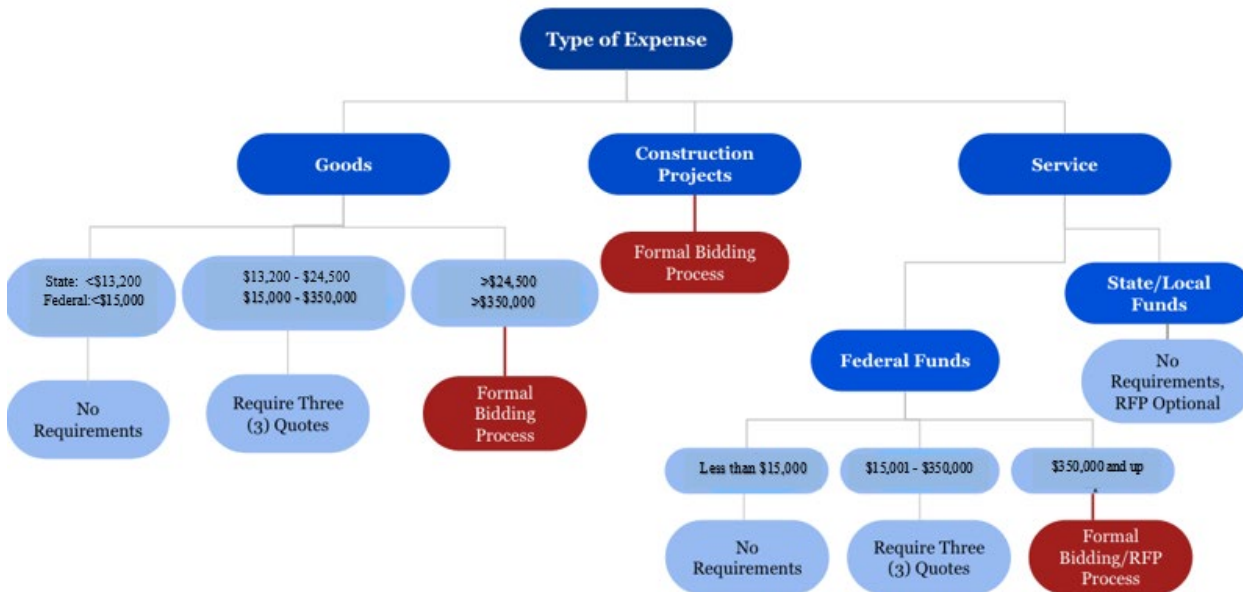
24 P.S. § 7-751: Applies to “construction, reconstruction, repairs, maintenance or work of any nature. . . upon any school building or upon any school property.”

- Mandatory bidding is required if construction costs exceeds \$24,500
- Must have “multiple prime contracts” for general construction, mechanical, plumbing & electrical work
- Districts may perform building maintenance through their own employees regardless of cost
- \$25,000+ in physical repairs warrant a Prevailing Wage Rate and applicable bonds
- Exceptions: Emergencies that render a building “unusable.” (However, PA Dept of Education is strict on “unusable.”)

24 P.S. § 807.1: Applies to “furniture, equipment, textbooks, school supplies & other appliances for the use of the public schools.

Exceptions: Non-textbook classroom materials such as globes, maps, recording, games, flashcards & demonstration devices necessary for school use.”

PROCUREMENT FLOWCHART



TYPES OF PROCUREMENT

Quotation - A formal statement provided by a vendor or supplier that outlines the price, terms, and conditions

Competitive Sealed Proposals begin with a **Request For Proposal (RFP)**

1. A method used when an exact solution or “how” to achieve an **outcome is not fully known**
2. In addition to cost, criteria such as quality, experience, technical merit and approach matter
3. Negotiations often help refine technical requirements and other terms before the final award
4. Goal is to secure the lowest responsive, responsible bidder

Competitive Sealed Bids begin with an **Invitation To Bid (ITB)**

1. A method used for **standardized products** or services with a clear, specific, detailed scope of work
2. The evaluation is objective and straight forward
3. Negotiations are not permitted
4. Goal is to secure the lowest possible price

Cooperative Purchasing - Utilizing a procurement unit within a state, out of state, or one that is available nationally

1. Types of Cooperative Purchasing:

- a. **Joint Purchasing** allows two or more public agencies to aggregate their product and service requirements into a single solicitation effort
- b. **Piggybacking** occurs when an agency uses another agency’s contract, even though it was not involved in the original solicitation and contract

***Examples:** COSTARS, PEPPM, KPN, and County Intermediate Units

Sole Source Procurements - Only available from one source, for the purchase of patented products, in the case of an emergency, or if competition is inadequate (after soliciting to multiple sources)

Emergency Procurements - When there is danger to the public health, safety and welfare, and immediate procurement of the service, materials or supplies is necessary

EMERGENCY PURCHASES

Emergencies can occur when imminent danger exists to persons, property or regular district operations. When bidding cannot be accomplished because of the need for immediate action, bidding decisions shall be made in accordance with existing legal requirements. [[1949 Act 14 Chapter 7 Section 51](#)]

The emergency bidding process under Section 751 allows a school district to bypass the usual public advertisement and competitive bidding requirements when a school facility becomes unusable due to an emergency. Here's how it works:

1. **Act quickly:** If a school plant or part of it becomes unusable (e.g., due to fire, flood, or structural failure)
2. **Solicit Bids:** The District must request bids from at least three responsible contractors for the necessary repairs or replacement
3. **Board Approval:** The School Board reviews the bids and approves one of them
4. **Immediate Action:** Once approved, the District can proceed immediately with repairs or replacement according to the terms of the selected bid
5. **Notification:** Business Administrator or Procurement Coordinator must notify the Secretary of Education, confirming that an emergency occurred and a bid was selected under this process

PURCHASING/CONTRACT PROCEDURES

Purchasing will be conducted in a manner consistent with applicable laws, meeting all requirements of State and Federal law, District policies, and sound business practices.

Situations may arise which are not fully covered by these procedures. The Business Administrator, Assistant Business Administrator and/or Procurement Coordinator are available to discuss and/or assist in any special situation or needs and will facilitate a solution in the best interest of the District.

The fact that a school district is under no legal requirement to obtain competitive pricing will not supersede the responsibility of being fiscally responsible.

Piecemealing proposals from the same vendor are prohibited as it is considered circumventing the procurement process.

*Purchases of goods or services between **\$13,200** and **\$24,500** require **three quotes** from at least three qualified and responsible vendors.

1. Before a requisition is entered into the accounting systems, a Procurement Specifications sheet (APPENDIX A) should be completed by the Budget Manager, or their designee and submitted to the Procurement Coordinator
2. The Procurement Coordinator will contact any vendors identified on the Procurement Specifications Form. Additional vendors may be contacted, at the discretion of the Procurement Coordinator, if applicable and/or necessary. Written quotes may be submitted with the Specifications Form
3. Obtained quotes will be presented to the Budget Manager to select the preferred quote
4. A requisition can be entered after the preferred quote is selected. The quote must be uploaded as an attachment

*Purchases of goods **above \$24,500** require a competitive sealed bid.

1. A Procurement Specifications Form (APPENDIX A) should be completed by the Budget Manager and submitted to the Procurement Coordinator
2. The Procurement Coordinator will meet with the Budget Manager to finalize specifications and scoring criteria for the RFP or ITB
3. The Procurement Coordinator will work with the solicitor to finalize the RFP or ITB
4. Prior to being advertised, the RFP or ITB will be reviewed by the Budget Manager to ensure all expected requirements are reflected

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5. The Procurement Coordinator will present any RFPs or ITBs to be advertised at a Finance Committee meeting
6. The Procurement Coordinator will coordinate advertisements of the RFP or ITB in accordance with State and Federal laws and District policy
7. Received proposals or bids will be reviewed and scored by the Selection Committee, in accordance with the bid and required specifications outlined in the RFP or ITB
8. Awards will be awarded to the lowest qualified bidder or lowest, responsible bidder, whichever is applicable by law
9. Once an award letter has been generated, the Procurement Coordinator will engage in contract negotiations
10. The Budget Manager must submit answers to the following questions:
 - a. Indicate if the contract/agreement is new or a renewal
 - b. Expected dates of service
 - c. Projected cost not to exceed
 - d. One sentence summarizing the company
 - e. What specific goods and/or services are being provided to WSSD
 - f. How will the District benefit from the obtained goods and/or service?
11. The contract will be presented at a Finance Committee meeting, then submitted for Board approval. Contracts submitted for Board approval will be provided to the Recording Board Secretary by Business Office personnel only
12. After an agreement is Board approved, or signed by the Business Administrator or Procurement Coordinator a requisition can be entered into the accounting system

RECEIVING PROCEDURES

Each Director or Principal is designated, or should designate someone, to be responsible for the receipt and accounting of all delivered goods and/or services applied to their budget. The receiving procedures are as follows:

1. Upon receipt, inspect to ensure all goods and/or services have been received or provided as outlined in the contractual agreement, quote or district-issued purchase order.
2. All invoices must include the appropriate purchase order number
3. All invoices should be emailed to accountspayable@wssd.org or billed/interofficed to:

Wallingford-Swarthmore School District
Attention: Accounts Payable
200 South Providence Road, Wallingford, PA 19086

4. Invoices approved to be paid must be signed by a Budget Manager or their designee

ITEMS DAMAGED OR MISSING

If items are damaged or missing or services have not be provided as expected or agreed upon:

1. The Budget Manager, or their designee, should contact the vendor immediately to inform them of the problem and obtain written instructions on how to proceed
2. Notify the Procurement Coordinator via email of the return and any information regarding payment for the returned item.
3. The invoice should not be submitted to the Business Office for payment, until the damaged or missing item(s) have been rectified or services have been rendered as expected
4. If the vendor does not provide a satisfactory solution, notify the Procurement Coordinator
5. Always refuse a damaged or duplicate shipment

PROCUREMENT SPECIFICATIONS FORM



Requestor Name:

Date:

Department/Building:

Funding Source (Check one): General Fund State/Federal Funding

If applicable, grant name and ID:

Budget Code for goods/services:

Exceptions (Circle/ highlight all that apply): Services, Outsourcing, Textbooks, Classroom supplies

Estimated Total Cost:

Request for New Technology form attached **Yes** **No**

Answer the questions with as much specific detail as possible. Please provide

1. What specific goods or services are being procured?

2. What is the problem to be solved by obtaining these specific goods or services?

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Recommended Vendor Name:
Website:
Point of Contact:
Phone Number:
Email Address:

Recommended Vendor Name:
Website:
Point of Contact:
Phone Number:
Email Address:

Recommended Vendor Name:
Website:
Point of Contact:
Phone Number:
Email Address:

Budget Manager Signature:

Date:

BUSINESS OFFICE USE ONLY

Received by (Print): _____ Date: _____
Course of Action:
Anticipated Board Approval:

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2025 - 2026 FINANCE COMMITTEE MEETING CALENDAR

MONTH	LEGAL SUBMISSION DATE	SUBMISSION DATE	AGENDA POSTED	MEETING DATE
AUGUST		8/6/2025	8/15/2025	8/19/2025
SEPTEMBER		9/3/2025	9/12/2025	9/16/2025
OCTOBER	9/12/2025	10/8/2025	10/17/2025	10/21/2025
NOVEMBER	10/10/2025	11/5/2025	11/14/2025	11/18/2025
DECEMBER	11/7/2025	12/3/2025	12/12/2025	12/16/2025
JANUARY	12/12/2025	1/7/2026	1/16/2026	1/20/2026
FEBRUARY	1/9/2026	2/4/2026	2/13/2026	2/17/2026
MARCH	2/6/2026	3/4/2026	3/13/2025	3/17/2026
APRIL	3/13/2026	4/8/2026	4/17/2026	4/21/2026
MAY	4/10/2026	5/6/2026	5/15/2026	5/19/2026
JUNE	5/1/2026	5/27/2026	6/5/2026	6/9/2026

BUSINESS OFFICE CONTACT INFORMATION

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Kirsten Zubko, Accounts Payable

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Kecia Brame, Payroll Clerk

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Brandi Johnson, Tax Clerk

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Sharon Dugan, Confidential Secretary

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