Purchasing

I. Purpose

This policy defines the process for purchasing supplies, equipment, materials, and services that will be used to meet the needs of the school district.

II. General Statement of Policy

The school district's purchasing process will comply with federal law, state statutes, the directives of the Minnesota Department of Education and the district auditor, and business best practices.

III. Requisition and Purchase Order Process

All orders of material value will follow the school district's requisition and purchase order process established by the executive director of finance and operations. In the case of an emergency or urgency of time, the process may be modified with the pre-approval of the executive director of finance and operations. Payments to vendors will not be approved until the receiving process has been completed for the purchase.

IV. Orders, Quotations, Bids, and Request for Proposal (RFP) Requirements

A. All purchases of products, services, and equipment must adhere to school district guidelines and directives established by the executive director of finance and operations (see Appendices I and II), including the following:

1. Purchases of less than $25,000 may be completed through quotations in an open market. So far as practicable, the requesting department must obtain multiple quotations.

2. Purchases of $25,000 to $175,000 require multiple quotes. The purchase will be awarded to the lowest, responsible, qualified vendor, taking into consideration the quality of the product and the ability to perform, given the needs of the district.

3. Purchases exceeding $175,000 will be put to bid with the exception of professional services, book requests under copyright law, or joint powers agreements.

4. Purchases funded in whole or in part by federal awards must also comply with federal procurement regulations and the most current version of the "Edina Public Schools Federal Procurement Manual," using the federal thresholds in effect at the time of procurement.

B. All purchase orders must be signed and dated, indicating receipt of merchandise and forwarded to the district office for payment.

C. All requests for proposals of services will include an explanation of services being sought, criteria for selection, and the application and selection process.

D. Every three to five years, the district will complete RFPs for management and administrative services (e.g., insurance carriers, waste management, legal counsel).

V. Reimbursement without a Purchase Order

A. Items purchased locally without a purchase order will require submission of a request for payment or an employee expense report form. Either form must have the original receipt attached and provide the necessary supervisor approval and budget code. The check for a request for payment will be paid directly to the vendor.

B. An employee that wishes to be reimbursed for a purchase will complete an employee expense report form, meeting the requirements stated above. The employee will not be reimbursed for sales tax incurred because of the school district's tax-exempt status.

VI. Procurement Card

A. Procurement cards will be issued to employees upon completion of an application, approval by the requesting employee's supervisor, and approval by the executive director of finance and operations. All holders of a school district procurement card must comply with all articles of this policy including its appendices.

B. Employees with procurement cards are required to submit their monthly expenditure reports accompanied by all receipts and expenditure allocations among pre-approved account codes without exception. Purchases with missing receipts will be reimbursed to the district by the employee who made the purchase.

Legal References

Minn. Stat. § 123B.02, subd. 23	General Powers of Independent School Districts: Credit Cards
Minn. Stat. § 471.345	Uniform Municipal Contracting Law
Minn. Stat. § 471.345, subd. 3	Uniform Municipal Contracting Law: Contracts Over $175,000

Minn. Stat. § 471.345, subd. 4	Uniform Municipal Contracting Law: Contracts Exceeding $25,000 But Not $175,000
Minn. Stat. § 471.345, subd. 5	Uniform Municipal Contracting Law: Contracts $25,000 or Less
Minn. Stat. § 471.345, subd. 15	Uniform Municipal Contracting Law: Cooperative Purchasing
2 C.F.R. §§ 200.317 to 200.327	Procurement Standards (Federal Uniform Guidance)

Cross References

Policy 708	Expense Reimbursement

Policy

Adopted	10/25/2010
Revised	03/12/2012
Revised	09/22/2014
Revised	02/27/2017
Revised	01/28/2019
Revised	04/17/2023
Revised	11/09/2026

APPENDIX I TO POLICY 707

Soliciting Prices Through Bids and Quotations

A. Expenditures for the purchases of goods and/or services, not exempt from state competitive bidding laws, will be subject to written quotations or formal bids within these restrictions:

1. Contracts Over $175,000

   If the amount of the contract is estimated to exceed $175,000, sealed bids will be solicited by public notice in the manner and subject to the requirements of state law.

   The executive director of finance and operations or their designee will:

   a. Prepare specifications for prospective bidders.

   b. Advertise for bids setting forth the goods and/or services to be included, and the date and place of the bid opening.

   c. Deliver sets of the specifications and form of proposal to all vendors requesting them and, in addition, others who might normally be interested in bidding.

   d. Receive and open bids on the date specified.

   e. Tabulate all bids. Tabulation will be presented to the school board. It will be provided to bidders upon request.

   f. Make a recommendation to the board on which bid appears to be in the best interest of the school district.

   g. Following approving action by the board, prepare a contract with the successful bidder

   h. Monitor the fulfillment of the contract to ensure compliance with the specifications.

   i. Ensure performance guarantees are provided.

      i. On any order which has been bid, a performance bond is required as follows:

         (a) 100% on furniture and equipment

(b) 100% on construction

ii. Bid bonds in the amount of 5% are required on all formal bids.

2. Contracts from $25,000 to $175,000

   If the amount of the contract is estimated to exceed $25,000 but not to exceed $175,000 the contract may be made either upon sealed bids or by direct negotiation, by obtaining multiple quotations for the purchase or sale when possible, and without advertising for bids or otherwise complying with the requirements of competitive bidding. All quotations obtained will be kept on file for a period of at least one year after receipt thereof, in accordance with Minn. Stat. 471.345 subd. 4 and subd. 15.

3. Contracts Less Than $25,000

   If the amount of the contract is estimated to be less than $25,000, the contract may be made either upon quotation or in the open market, at the discretion of the board; but so far as is practicable, the contract will be based on multiple quotations which will be kept on file for a period of at least one year after receipt thereof, in accordance with Minn. Stat. 471.345 subd. 5.

4. Formal Bidding Procedures

   Sealed bids are to be opened in the district office, at the specific time stated in the bid form. Bids on construction contracts and items of unusual nature are to be opened at the district office at a regular time as stated in the bid form. All bidders will be notified of the opening and invited to be present. Bids or quotations received after the date and time specified will be returned to the bidder unopened.

5. Purchases funded in whole or in part by federal awards will also comply with federal procurement regulations and the most current version of the “Edina Public Schools Federal Procurement Manual”.

B. The board will have discretion in determining the responsibility of the bidders based on conformity with specifications, terms of delivery, and other conditions imposed in the call for bids or the specifications and will award the contract to the lowest responsible bidder, providing the bidder fully meets the specifications.

C. Changes in the amount or the condition of the bid will not be allowed once the bid has been received by the board or its agents. Awards will be made only on the specifications advertised or amended prior to the official opening of the bids.

Appendix

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Revised	03/12/2012
Revised	09/22/2014
Revised	02/27/2017
Revised	04/17/2023
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Contracting Authority to Purchase

A. A contract is defined as an agreement entered into for the sale, purchase, or license of supplies, materials, services, software, equipment, or the rental thereof, or the construction, alteration, repair, or maintenance of real or personal property, and services. All contracts will comply with applicable bid laws and school board policies. The terms of such contracts, except for capital leases, will not exceed five years with an annual option to renew.

B. Contracting authority resides solely with the board.

C. For contracts in an amount not exceeding a total payment of $175,000, the board will delegate to the superintendent the authority to lease, purchase, license, and contract for goods and services within the budget as approved by the board. Splitting of contracts voids the contract and is not permissible. If more than one contract is entered into with a particular vendor on a project, and at some time during the course of the project it appears that the cumulative cost of the contracts will exceed $175,000, board action is required for the remaining contracts in connection with said project.

D. No individual purchase, license, or lease ("contract") for $175,000 or greater will be made or authorized, except at a regular meeting of the board or at a special meeting of which all members have had notice.

E. All material modifications to board-approved contracts require ~~school~~ board action. The administration may request a board exemption from this policy for any purchase which is exempt under state law.

Appendix

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