Regulation DJE-R(1): Purchasing Status: ADOPTED

Original Adopted Date: 03/12/2021 | Last Revised Date: 06/22/2023 | Last Reviewed Date: 06/22/2023

Pursuant to Board Policy DJE, the Superintendent implements the following procedures for purchases of supplies, equipment, and services for the Bibb County School District ("District" or "BCSD") schools and departments. This Regulation applies to all funds, including state and federal funds, school activity accounts, nutrition funds, capital project funds, and the District's general fund.

Additionally, the Superintendent authorizes the Procurement Department to implement a Procurement Manual providing additional information on the obligations of principals and department heads when purchasing supplies, equipment, and services for the District. School principals and department heads will be required to follow the manual when making purchases on behalf of their schools and department.

~~A.~~ ~~Definitions~~

~~The following terms apply to this Regulation and are further addressed in the Procurement Manual, located on the District's website and found under the Procurement Department link.~~

~~**RFI (Request for Information):** A Request for Information ("RFI") is a request for information only and spans the market seeking broad data and knowledge. No information on costs will be gathered through a RFI and no awards will be made in response to an RFI.~~

~~**Request for Proposals ("RFP"):** A Request for Proposals ("RFP") announces and provides details about a project or item the District is seeking to use in its schools or departments.~~
~~When there is a process or job that is unknown, and BCSD wants to evaluate the supplier community, a RFP will be issued. This process allows the District to evaluate the merits of each vendor response without committing to the purchase until the best sources are identified.~~

~~**Request for Quote ("RFQ"):** A Request for Quote ("RFQ") seeks to determine the qualifications other and other specific information relating to a potential supplier or vendor and gauges competition in the marketplace. During the RFQ process, the vendors or suppliers are asked to commit to a price, quality, and delivery of an item.~~

~~**SS (Single/Sole Source ("SS"):** Single/sole source ("SS") means that only one supplier or vendor, based on the District's research, knowledge and belief, is capable of providing or delivering the required product or service. See Section I, Exemptions to Bidding, for additional information.~~

~~B.~~A. Responsibilities of the Procurement Department

The Procurement Department is responsible for ensuring the District is in compliance with all federal, state, and local laws when securing necessary supplies, equipment and services. Communication between the requisitioning school or department (Requisitioner) and Purchasing (Procurement Department) is a mutual responsibility. As such, the Procurement Department will coordinate, when necessary, appropriate technical skills required to purchase all goods, supplies, equipment and services necessary for the continuous operations of the District including:

- Communicating with suppliers in matters of price, quality, and delivery at both the quotation stage and ordering stage of procurement;
- Identifying approved vendors;
- Negotiating with suppliers;
- Communicating with schools and major departmental users to stay current with planned needs;
- Helping schools and departments develop specifications for the required products;
- Providing acceptable terms and conditions for procurement; and
- Establishing, maintaining, and ensuring compliance with purchasing policies and procedures.

~~C.~~B. Responsibilities of the School or Department

The school principal or department head should notify the Procurement Department when they are:

- Seeking a payment from the Accounting Department;
- Developing an item specification for planned procurement;
- Requesting that specific suppliers be added to a bid list;
- Planning procurement action involving a potential sole or single source of supply; or
- Needing to identify sources of supply for a specific item or commodity.

Defective Services or Products: The School principal or department head should immediately reach out to the Procurement Department if the services or products obtained are not in compliance with the specifications or expectation.

Staff Training: The School principal or department head is responsible for providing a copy of this Regulation to staff and training on the general procurement process each year.

~~D.~~C. Vendor Responsibilities

All vendors are required to follow the Procurement Vendor Manual, located online via the Procurement Department link.

~~E.~~D. Approval Limits

Expenditure Range	Solicitation Method
Under $10,000.00	The School or Department is responsible for solicitation of **one** written supplier quotation. Multiple quotes are not required, but recommended.
$10,00~~1~~0.00 - $~~4~~29,~~500~~999.~~00~~99	The School or Department is responsible for solicitation of **three or more written** supplier/competitor quotations. Evidence of requisition approval and quotation should be retained ~~provided~~ in MUNIS as an attachment to the request.
$~~3~~50,000.00 or over	Formal solicitation process is required. The Procurement Department will guide the requesting school/department through the solicitation process. The Procurement Department will maintain evidence of procurement procedures.
Over $150,000.00	Formal Board approval is required in accordance with Policy DJEAA, Board Approval.

~~F.~~E. Procurement Process

All purchases shall be based upon the acquisition of goods and services determined to be in the best interest of the District. Specifically, the District ~~shall~~ will 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.

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. 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.

To initiate a transaction, a purchase requisition must be created in the MUNIS system and forwarded to the appropriate approver. Once approved, the completed requisition is transmitted to the Procurement Department for further processing and release of the BCSD Purchase Order.

The Procurement Department will review system requisitions, generate purchase orders, and support distribution of purchase orders to vendors. It is expected that all purchases ~~shall~~ will be made by formal contract, purchase order, or be accompanied by a receipt.

The school or department that receives goods or other items through the procurement process is responsible for promptly unpacking and inspecting to ensure that the same is in proper working order and there are no issues. If the goods meet the schools/department's approval, a receiving copy should be electronically signed and sent to the Accounting Department.

~~G.~~F. Purchasing Ethics

All funds held by the Board of Public Education for Bibb County ("Board"), the District, and its local schools, regardless of the source, are held in public trust. As a result, District employees will approach all purchasing and procurement decisions as responsible stewards of public funds.

Decisions about BCSD business and the use or disposition of BCSD property are to be made solely in terms of the benefits to BCSD and are not to be influenced by any private profit or other benefit to the BCSD people who take part in such decisions. All members of the BCSD community have an obligation to avoid any conflicts of interest or even the appearance of a conflict of interest.

District employees shall not engage in unethical behavior or compromising practices in relationships, actions and communications with present or potential suppliers. Further, District employees shall avoid the intent and appearance of unethical behavior or compromising practices in relationships, actions and communications with present and potential suppliers.

District employees or consultants it has engaged are expressly prohibited from soliciting, demanding or accepting directly or indirectly, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with the following: (1) approving, disapproving, recommending, or preparing any part of a program requirement or purchase request; (2) influencing the content of any specification or procurement standard, rendering of advice, investigation, or audit; or (3) awarding a contract.

Any District employee who observes or suspects unethical behavior in the procurement of goods or services should report that behavior to the following individuals or offices, as appropriate under the circumstances: (1) the individual's supervisor; (2) Executive Director of Procurement; (3) Assistant Superintendent of Human Resources; or (4) the Superintendent.

Purchases from Board members or companies in which the Board member or a member of his/her immediate family has a controlling interest are prohibited. For purposes of this Regulation, "immediate family" means a spouse, child, sibling, or parent or the spouse of a child, sibling, or parent.

Purchases cannot be made on behalf of a school or department from a relative of an employee working in the school or department. Additionally, purchases from employees, or companies in which an employee's relative has a controlling interest or makes purchasing decisions, are prohibited. For purposes of this Regulation, a "relative" includes the employee's spouse, child, grandchild, great-grandchild, parent, grandparent, great-grandparent, brother, sister, nephew, niece, aunt or uncle, and all of the same relatives of the employee's spouse. These relationships include those arising from half-blood, adoption, or marriage.

~~H.~~G. Unauthorized Purchases

It shall be prohibited for any employee to purchase, or contract to purchase, any services, supplies or equipment in violation of this Regulation. District employees are prohibited from entering into purchase contracts or obligating the District's funds, unless specially authorized to do so by the Superintendent, ~~Chief of Staff~~Deputy Superintendent, Chief Financial Officer, ~~FO~~ or the Executive Director of Procurement ~~Procurement Director~~ in writing.

Suppliers and other entities engaging in business with the District should carefully review this Regulation and are further advised that all purchases chargeable to the District must be in compliance with this Regulation. If any purchase is made contrary to this Regulation, the Board and District shall not be bound thereby.

Any negotiations in violation of this Regulation are considered unauthorized purchases and the individual may encounter a personal obligation to the supplier. Suppliers ordinarily doing business with the BCSD are aware of this Regulation and are advised that all purchases chargeable to BCSD must be authorized by an official purchase order.

H. Exemptions from Bidding

See Policy DJED and Regulation DJED-R(1) addressing purchases exempt from the bidding process.

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

- ~~**State Contract Items:** Exemption from Bidding for these items is at the discretion of the Purchasing Agent. BCSD may be able to purchase items at better than state contract prices.~~
- ~~**BCSD Contract Items:** BCSD has contracts in place which preclude bidding at the time of requisition. These contracts have been bid or negotiated previously based on BCSD's total requirements for a particular commodity. Examples include items on the technology bid list or, School Nutrition Services bid list.~~
- ~~**Single/Sole Source Purchases:** Applies to purchases over $350,000. The need for bidding may be waived if the requestor can properly justify this position in writing; and approved by the Procurement Department. The Pprocurement dDepartment will authorize the sole source only if the purchase qualifies as a sole source.~~
- ~~**Emergency Orders:** An emergency order is defined as a critical situation which is an unanticipated and sudden occurrence and is life threatening, catastrophic, or involves pressing necessity for immediate repairs, reconstruction or maintenance in order to permit the safe continuation of a necessary use or function, or to protect the property or the life, health or safety of any person. An Emergency Justification Form must be submitted electronically to the Procurement Department via email.~~
- ~~**Exempt Per Policy:** All items listed within the~~ See Policy DJED and Regulation DJED-R(1) ~~Policy as exempt purchases, may be deemed exempt as needed.~~
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I. Questions or Concerns

Any school principal, department head, supplier, or vendor should reach out to the Procurement Department ~~(478-779-35262)~~ regarding questions or concerns with the process and requirements set forth in this Regulation.