



RAVENA-COEYMANS-SELKIRK CENTRAL SCHOOL

PURCHASING GUIDELINES

The School Board and Purchasing Agent are required by law to award all purchase contracts for supplies, materials and equipment involving expenditures in excess of \$10,000 and all contracts for public works in excess of \$20,000 to the lowest responsible bidder after advertising for public sealed bids. *General Municipal Law, Section 103.*

Goods and services which are ***not required by law*** to be procured pursuant to competitive bidding must be procured in a manner so as to assure the prudent and economical use of public funds. To further these objectives, the School Board has adopted internal policies, *Board Policy 5410*, and procedures, *5410R.1-3*, governing all procurements of goods and services which are not required to be made pursuant to the competitive bidding requirements.

Procedures for Originator of Purchase Request:

- Obtain budget codes and limits from administrator.
- Fill out budget requisition and return to administrator for authorization.
- If item being ordered IS NOT ON STATE CONTRACT, refer to attached sheet for additional steps.

Things to watch out for:

- ✓ Am I using an up to date catalog? Try to use on-line catalogs whenever possible.
- ✓ Am I using the right account codes?
- ✓ Do I have enough money?
- ✓ Factor 15% for shipping, no exceptions.
- ✓ Discount codes MUST BE CURRENT. You will be back charged if they are invalid.

Important Information:

NO ONE SHOULD PLACE ANY ORDER OR AUTHORIZE ANY EXCHANGE WITH A VENDOR. All orders and/or exchanges MUST BE authorized by the Purchasing Agent and go through the Business Office.

- Create a Budget Request for Hold money. MUST BE assigned to a specific vendor. This can be changed later.
- No single order less than \$15. Does not include vendors where your order will be combined with others, .i.e. Staples.

- With the single exception of requesting pricing, please DO NOT call vendors. Should you need information from the Vendor, contact the Business office.
- District is REQUIRED to attempt filling of any order through NYS Preferred Sources, such as CORCRAFT. We will apply the form, function and utility standard defined by NYS Procurement Source Guidelines in determining suitability of substitute item.
- For products available under state contract, and which are also available from another source below the State contract price, no further quotes are required provided the product is the same brand and model and below the \$10,000 bid threshold. Be sure to provide a copy of the state contract price sheet.

FOR ITEMS NOT ON STATE CONTRACT, THE FOLLOWING APPLIES

<u>Estimated Amount of Purchase</u>	<u>Procedure/ Requirements</u>	<u>Responsibility</u>
Less than \$500	At least two (2) catalog or price sheet comparisons.	Obtained by originator
\$501 - \$1,500	Two verbal quotations, name of vendor and date of quote.	Obtained by originator. The originator must indicate on the purchase requisition form the basis for the determination that the suggested vendor be used
\$1,501 - \$4,000	Three (3) verbal or written quotations, name of vendor and date of quote	Obtained by the School Business Official
\$4,001 - \$10,000	Three formal written quotations	Obtained by the School Business Official
In excess of \$10,000	Publicly advertised bids in accordance with General Municipal Law	Obtained by the School Business Official

Check List for Administrators and Supervisors

As someone responsible for a budget, it is your responsibility to carefully check each purchase request for the following:

- Review the purchase request for accuracy. Apply the form, function and utility standard. (see below) i.e. *Does someone really need \$35 pens?*
- Are the Account Codes correct?
- Does the Originator have enough funds available?
- Is the Vendor on State Contract?
 - Have we checked Preferred Sources?
 - If not, why are we not using a Vendor on State Contract?
 - Has the originator included correct documentation & justification?
- Has 15 % Shipping been included?
- If originator is using a discount code, is it valid? (Discount codes expire. A code valid in January is not necessarily valid in July. Any additional expense due to an invalid code will be debited from the account. If no funds are available, any additional amount will be debited from your 479 line.)

Form, Function and Utility Standard

The Accounting office and Purchasing Agent are required to apply the form, function and utility standard developed by the NYS Procurement Source Guidelines to all purchases and attempt to fill the order through a preferred source. To apply the form, function and utility standard, the agency should define the commodity in terms of the **minimum essential requirements** which will meet its needs. Every effort should be made to purchase from the preferred source so long as the item meets the agency's needs. Requirements may include quantity, quality, delivery, performance standards and compatibility, among others. Requirements should not be inflated or overstated to eliminate preferred source suppliers; nor should an agency acquire a preferred source product which is materially unsuited to the needs of the agency.

In making the form, function and utility determination, administrators and supervisors should consider the following:

- Does the commodity offered by a preferred source or lowest bidder meet department specifications or industry standards?
- Are there deviations from specifications of the commodity that will suffice or substantially meet the minimum requirements for form and function?