

BIDDING / PURCHASING REQUIREMENTS

The following requirements and associated procedures and guidelines are established to help all employees through the procurement process. It is the intent that a sense of ownership within our schools will bring about fiscally sound judgment and responsibility.

Purchasing requirements for purchases of more than \$5,000

1. The District Administrator, or his/her designee, is authorized to purchase any item or group of items in a single transaction, costing more than \$5,000 but less than \$10,000, upon the receipt of at least three written quotations, or bids. The District Administrator, or his/her designee, shall use discretion in deciding whether such purchases are made on the basis of requested quotations or through advertised bids.
2. No purchase shall be made for supplies, services or equipment costing \$5,000 or more unless the formal bid notification procedures are followed and the purchase is approved by the Board of Education.
3. Prior to commencing construction of a new building, or additions to or repairs or renovations of an existing building costing more than \$5,000 or more, the Board shall obtain competitive bids on all material and labor to be required to complete the proposed construction, addition, repair or renovation. Repair work normally done by school district employees is exempt from this bidding requirement.
4. Bids are not necessarily required for:
 - a. Instructional textbooks, books, tapes, films, media, workbooks, educational kits, periodicals, and computer hardware, peripherals, and software.
 - b. Replacement parts for existing equipment where the value of the replacement parts are estimated to be less than 50% of the total present value of the equipment.
 - c. Cooperative Educational Service Agency (CESA) and other intergovernmental contracts.
 - d. Specific computer equipment only after system analysis has demonstrated its unique need.
 - e. Material that can be purchased from only one vendor.
5. Bids are not required for architectural services, attorney services, and personal service contracts.
6. Bids are not required when a purchase is made using a current state of Wisconsin competitive bid price for items including, but not limited to: computers, copiers and vehicles.

Requirements for purchases less than \$5,000

The following guidelines pertain to purchases of less than \$5,000. These guidelines should be used by all employees to help attain the most efficient use of the budgeted dollars available.

1. Only individuals who are responsible for specific budgets shall approve purchases, purchase orders, contracts, and other forms of financial obligation for expenditures from that budget. The District Administrator shall appoint primary and secondary designees for non-capital budget items. (Ex.: Principal and Associate Principal)
2. The District Administrator or his/her designee is authorized to purchase any item, group of items and/or services in a single transaction as follows:
 - a. All purchases of less than \$5,000 may be made in the open market but should be based on competitive quotations or prices.
 - b. Emergency maintenance needs as required.
3. In reviewing all purchases, cost should be of primary concern. In attempting to maintain high quality and durable goods however, consideration should also be made in relation to the products compatibility with existing materials, warranty, service capability and expected life cycle. Products and/or services which have previously failed to meet expectations may be rejected.

Assuming cost and materials and/or services are comparable, local economy will be given preference in purchasing.

Bidding Procedures

The following bidding procedures are designed for use by the District Administrator and all other school officials who may have responsibility in this area.

- A. Formal Bid Notice shall contain the following:
 - a. Invitation to file sealed bids with the District Administrator, or his/her designee;
 - b. Time limit for receiving bids by the District Administrator or his/her designee;
 - c. Time and place of bid opening;
 - d. Statement that bid forms and specifications may be obtained from the District Administrator or his/her designee;
 - e. Statement that the right is reserved to reject any and all bids and to waive technicalities;
 - f. When appropriate, bid specifications shall include penalty clauses.
- B. Awarding Bids
 1. Bids shall be opened publicly at a specified time and place as stated in the bid advertisement or the invitation to bid. Bids may be opened by the District Administrator and/or his/her designee.
 2. Unless otherwise stated in the bid notice, the award shall be made by total lot. However, the right is reserved to make awards by items or groups of items when it appears to be in the best interest of the district to do so.

3. Voluntary alternates submitted by bidders shall not be considered in determining low bids. Alternates may be negotiated after the successful bidder has been determined.
4. In making the award, the low dollar bid shall be considered first. If the bid does not meet Board specifications, the next lowest bid will be considered. This format shall be followed until the lowest bid for merchandise meeting specifications is determined and the award made. If none of the bids meet specifications or other purchase guidelines, a new bid notice may be repeated if necessary.
5. If two or more bids are determined to be equal, the following considerations will be utilized:
 - a. Offering merchandise that is of the make preferred by the using school or department
 - b. With a place of business which is located within the school district
 - c. Offering equipment that is serviced within the district
 - d. Offering the most timely delivery when a quicker delivery is to the advantage of the district
 - e. Offering merchandise that is manufactured or by companies based within the State of WisconsinIf the bids are equal in every respect, then the award shall be decided by drawing.
6. Bids or quotations shall be rejected and not included in the tabulation for consideration when:
 - a. They are not received prior to the time specified in the bid notice
 - b. They are not firm
 - c. They are not signed
 - d. The bidder has changed or qualified the bid:
 1. Changing the delivery or FOB point to the disadvantage of the district.
 2. Offering unsatisfactory merchandise
 3. Making other substantial change(s).
7. Quotations as submitted are final and not subject to change unless amended requests are sought from a minimum of the three lowest qualified bidders.
8. All bids received after the date and time specified shall be returned to the bidder unopened. Changes in the amount or condition of the bid will not be allowed once the bid has been received.
9. The Board reserves the right to reject any and all bids or any bid or bids may be rejected which, in their opinion, are excessive, over the budgeted appropriation or not sufficient to properly meet specifications. The Board also reserves the right to reject the bid of the bidder whose products and or services have previously failed to meet expectations. The Board further reserves the right to accept the bid which, in their opinion, will be more beneficial to the school and community.
10. Final bid tabulation will be available for inspection by all bidders.

C. Competitive Bids on Building Construction, Renovation and Repairs

In addition to the above, the following procedures are also necessary prior to commencing construction related to a new building, a new addition or renovations or repairs to existing buildings.

1. The Board shall advertise for bids once each week for two successive weeks in a newspaper of general circulation in the area.
2. When required, each bidder shall file a surety bond or cashier's check with the Board in the amount of 5% of the amount of the bid, conditioned to secure the school district from loss or damage by reason of the withdrawal of the bid or by the failure of the bidder to enter a contract for performance if the bid is accepted by the Board.
3. Performance bonds shall be required from the prime contractor in accordance with state law.

APPROVED: September 18, 2017
REVISED January 21, 2019