

PURCHASING

The Board supports economic development in Iowa. Purchases by the School District will be made in Iowa for Iowa goods and services from a locally-owned business located within the School District or from an Iowa-based company which offers these goods or services if the cost and other considerations are relatively equal and they meet the required specifications.

Targeted Small Business Goals

Prior to August 15 of each year and after analyzing the School District's anticipated procurement level for the current fiscal year, the School Board will set a goal of ten percent of the anticipated procurement level to be purchased from certified targeted small businesses. In determining the procurement level, the cost of utilities (heat, electricity, telephone and natural gas) and employees' costs will not be included. After the goal has been established, the Superintendent will file the required Targeted Small Business Procurement form with the Department of Education by August 15.

By July 31 of each year, the Superintendent will file a report with the Department of Education outlining purchases of goods and services from targeted small businesses for the previous fiscal year.

The School Board and Superintendent will encourage targeted small businesses which are not certified with the Department of Inspection and Appeals to become certified targeted small businesses.

Purchasing Level Approvals

It shall be the responsibility of the Superintendent to approve purchases, except those authorized by or requiring direct Board action. The Superintendent may coordinate and combine purchases with other governmental bodies to take advantage of volume price breaks. Joint purchases with other political subdivisions will be considered in the purchase of equipment, accessories or attachments with an estimated cost of \$50,000 or more.

- The Superintendent shall have the authority to authorize purchases for goods and services costing under **\$25,000** without prior Board approval.
- For goods and services costing more than **\$25,000** and less than **\$100,000 or the current statutory limit**, the Superintendent shall receive quote(s) of the goods and services to be purchased, **(703.4 R-3)** prior to approval of the Board.
- District curriculum purchases utilize a review of materials procedure with a negotiated rate for selected materials that best meet District goals and objectives. A Competitive sealed bid process is not used for curriculum materials. Curriculum adoptions and purchases for goods that cost \$25,000 or more require approval by the Board.
- District Technology purchases utilize a study by the Technology Department based on District specifications. A competitive sealed bid process is not used for technology materials. Technology adoptions and purchases for goods that cost \$25,000 or more require approval by the Board.

The purchase will be made from the lowest **responsive**, responsible bidder based upon total cost considerations including, but not limited to, the cost of the goods and services

being purchased, availability of service and/or repair, delivery date, the targeted small business procurement goal and other factors deemed relevant by the Board.

The Board and Superintendent shall have the right to reject any or all bids, or any part thereof, and to re-advertise. If it is determined that a targeted small business which bid on the project may be unable to perform the contract, the Superintendent shall notify the Department of Economic Development. The Board will enter into such contract or contracts as the Board deems in the best interests of the School District.

Purchases by Public Sealed Bids

Public, competitive sealed bids are required for construction projects, including renovation and repair, with a cost exceeding the statutory minimums required by law (established as \$100,000 for **contracts accepted after** January 1, 2007). The public, competitive sealed bid requirement is waived in the case of emergency repairs when the repairs are necessary to prevent the closing of a school. The AEA administrator will certify that the emergency repairs are necessary to prevent the closing of a school. **The requirement is also waived for privately funded work and repair or maintenance work performed by district employees to keep the facility in sound condition.** The Superintendent will comply with the competitive quote process for those projects subject to the competitive quote law. (Exhibit 703.4-E1) **It is a requirement that a registered engineer or licensed architect prepare the plans and specifications for the project and calculate the estimated total cost of the proposed public improvement. Included within the calculations for estimated total cost are the total costs to the district to construct the improvement, including costs of labor, materials, equipment and supplies. If the estimated total cost of a public improvement exceeds the competitive bid threshold of \$100,000 or statutory limit, a school district shall not divide the project into separate parts regardless of intent.** The Superintendent will determine the process for obtaining quotes for projects below the competitive quote limit. The Superintendent shall approve the quote for the project.

The award of construction contracts will, generally, be made to the lowest **responsive**, responsible bidder. The Board, in its discretion, after considering factors relating to the construction, including, but not limited to, the cost of the construction, availability of service and/or repair, completion date, and any other factors deemed relevant by the Board, may choose a bid other than the lowest bid. The Board will have the right to reject any or all bids, or any part thereof, and to enter into the contract or contracts deemed to be in the best interest of the School District.

It is the responsibility of the Superintendent to make a recommendation and the reason for it to the Board for construction contract bids. The Board Treasurer shall recommend, to the Board, which bid to accept.

Reimbursement to District Personnel

The District will reimburse individuals for purchases made for purchases of materials that meet District curriculum guidelines. The District will not reimburse any individual that has paid another person or entity for services. Authorization must be given prior to the purchase being made by the administrator responsible for the budget that the purchase will be charged to. The District requires itemized receipts for all purchases. If the purchase price exceeds \$25.00, the District will not reimburse any sales tax charged on the purchase. Reimbursement requests should be submitted in a timely manner for

budget purposes. The District will not reimburse for receipts that are over one year old, and at the discretion of the Board Treasurer may not reimburse for receipts less than one year old.

Legal Ref.: Iowa Code §§ 26; 28E; 72.3; 73; 73A; 285; 297; 301.
261 I.A.C. 54.
281 I.A.C. 43.25.

Cross Ref.: 701.3 Fiscal Management Goals
704.1 Purchasing Authority
704.2 Approval and Payment for Goods and Services
801.7 Requests for Improvements and Alterations

ADOPTED: 6/11/90
7/12/93
2/14/00
2/9/04
2/26/07
4/9/12

Reviewed: 6/93, 1/5/00, 11/13/03, 1/8/04, 2/1/07, 3/7/12, 3/7/19