



Book	Policy Manual
Section	First Reading by Board
Title	PURCHASING
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6320 - **PURCHASING**

Procurement of all supplies, materials, equipment, and services paid for from District funds shall be made in accordance with all applicable Federal and State statutes, Board policies, and administrative guidelines. Standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award, and administration of contracts are established in Policy 1130/~~Policy 3230/~~and Policy 4230 – Ethics and Conflict of Interest.

All procurement transactions shall be conducted in a manner that encourages full and open competition and in accordance with good administrative practice and sound business judgment.

It is the policy of the Board that the District Administrator seek at least _____ (___) **[INSERT NUMBER]** price quotations on purchases of more than \$_____ **[INSERT DOLLAR AMOUNT]** for a single item, except in cases of a single vendor, emergency, or when the materials purchased are of such a nature that price negotiations would not result in a savings to the District.

Competitive Bids

Purchase of and contract for projects will be subject to a competitive bid process as and when required by law. The Board reserves the right to reject any and all bids.

[] When the purchase of, and contract for, single items of supplies, materials, or equipment is reasonably anticipated to ~~re~~ reach the amount of \$_____ **[INSERT DOLLAR AMOUNT]** or more, the _____ shall obtain competitive bids. **[END OF OPTION]**

[] Bids shall be sealed and shall be opened by the _____ in the presence of at least one (1) witness. A bidder may be required to submit a sworn statement regarding:

- financial ability to complete the contract, including the posting of a bond where appropriate or required;
- nature and quality of equipment to be used in performing the contract;
- experience and past performance in performing the contract;
- such other information the District deems relevant to the protection and welfare of the public in the performance of the contract or that are required by applicable law.

Such statements shall be delivered to the District no later than five (5) business days prior to the bid opening, or as directed by the applicable RFP, and shall be kept confidential by the District, except upon the written order of the person submitting the statement or on behalf of whom the statement is submitted, for the necessary use by the District in qualifying the person/bidder or the District. The statements shall be reviewed and the bidder notified if it is qualified to submit a bid.

[END OF OPTION]

Purchasing Items with Federal Grant Funds (See also Policy 6325 - Procurement - Federal Grants/Funds)

When purchasing items with Federal funds, a District shall:

- A. give consideration to whether separating or combining purchases will provide for a more cost-effective approach to avoid acquisition of unnecessary or duplicative items;
- B. where appropriate, conduct an analysis of lease versus purchase options, and the most economical and beneficial method shall be pursued;
- C. conduct an evaluation of the availability and feasibility of entering into intergovernmental agreements to procure the goods or services required on a shared basis;
- D. in the case of a time and material contract, make a determination that no other arrangement is suitable and that the contract places a ceiling price that protects the District.

General Provisions

The District Administrator is authorized to purchase all items within budget allocations. () For additional information on hiring consultants, see Policy 8125 - Consultants. **[END OF OPTION]**~~The Board reserves the right to reject any and all bids.~~

Contracts can be awarded by the _____ without Board approval for any single item or group of identical items costing less than \$_____. **[INSERT DOLLAR AMOUNT]**. All other contracts, if not included in the approved budget or an amendment or revision to the budget, require Board approval prior to purchase. **[END OF OPTION]**

~~The Board shall be informed of the terms and conditions of all competitive bids and shall award contracts as a consequence of such bids.~~

~~The District Administrator is authorized to purchase all items within budget allocations. () For additional information on hiring consultants, see Policy 8125 - Consultants. **[END OF OPTIONS]**~~

The Board should be advised, for prior approval, of all purchases of equipment, materials, and services when the purchase

() was not contemplated during the budgeting process.

() exceeds the

() line item by the _____ or %; or

() varies materially from the function or scope as budgeted.

[END OF OPTION]

The District Administrator is authorized to make emergency purchases, without prior approval, of those goods and/or services needed to keep the schools in operation. Such purchases shall be brought to the Board's attention at the next regular meeting. **[END OF OPTION]**

Whenever storage facilities or other conditions make it impractical to receive total delivery at any one time, the total quantity to be shipped shall be made a part of the bid specifications.

Before the _____ places a purchase order, the _____ s/he shall

() have the _____

check whether: (a) the proposed purchase is subject to bid; (b) whether sufficient funds exist in the budget; and (c) the goods or services might be available elsewhere in the District. All purchase orders shall be numbered consecutively. **[END OF OPTION]**

In the interests of economy, fairness, and efficiency in its business dealings, the Board requires that:

- A. () items commonly used in the various schools or units thereof, be standardized whenever consistency with educational goals can be maintained;
- B. () opportunity be provided to as many responsible suppliers as possible to do business with the School District;
- C. () a prompt and courteous reception, insofar as conditions permit, be given to all who call on legitimate business matters;
- D. () where the requisitioner has recommended a supplier, the _____ may make suggestion alternatives to the requisitioner if, in the _____ 's/his/her judgment, better service, delivery, economy, or utility can be achieved by using a different supplier;
- E. () upon the placement of a purchase order, the _____ shall commit the expenditure against a specific line item to guard against the creation of liabilities in excess of appropriations.

[END OF OPTION]

The District Administrator shall determine the maximum expenditure allowed without a properly signed purchase order. **[END OF OPTION]**

Employees may be held personally responsible for anything purchased without a properly signed purchase order or authorization. **[END OF OPTION]**

The Board may acquire office equipment by lease, installment payments, lease-purchase agreements, or by lease with an option to purchase, provided the contract sets forth the specific terms, including price, of such a purchase.

Debarred Contractors Excluded

The District shall not award any contract, agreement, or subcontract for goods or services to any party that has been suspended or debarred from receiving contracts or subcontracts by the Federal Acquisition Regulations (FAR).

For any contract or subcontract with a value in excess of \$25,000, the District shall **[OPTION #1]** verify that the contractor or subcontractor and any principle is not listed on the General Services Administration's list of debarred or suspended contractors in the Excluded Parties Listing System (EPLS) **[END OF OPTION #1]** **[OPTION #2]** require that each such contractor or subcontractor obtain certification from the General Service Administration that it is not a suspended or debarred contractor **[END OF OPTION #2]** **[OPTION #3]** include a provision in the contract or as a condition of any subcontract award that the contracting party attest that it is not at the time of contracting a suspended or debarred party under the Federal Acquisition Regulations **[END OF OPTION #3]** and that, if at any time during performance of the services or delivery of goods in the applicable contract, said contractor or subcontractor should be identified as a suspended or debarred entity by the General Services Administration, the contractor or subcontractor shall immediately notify the District of that fact, which shall serve as sufficient grounds to terminate the contract as the District determines is appropriate.

Purchasing Procedures

All purchasing by the District shall be delegated by the Superintendent to the Assistant Superintendent of Operations or his/her designee.

Purchasing for budgeted items shall originate with key personnel directly responsible for their use. The Assistant Superintendent of Operations shall arrange for appropriate administrative review whereby all purchasing will be examined and approved, or denied.

District staff making purchasing decisions will consider price, quality, service, guarantee of product, payment terms, delivery and dependability of supplier. Employees are to purchase only budgeted items, purchase only goods and services that are appropriate, manage their budgets, and account for what is purchased.

If the Operations Office denies a purchase based upon budget availability, it will be returned to the person who entered the requisition, check request or P-Card transaction. When sufficient budgeted funds are not available in an account to permit the purchase of goods or services necessary to the educational program or to the operation or maintenance of the District, budget transfers will be required.

Purchase Orders

Requisitions for budget items shall be entered into the District's financial software by personnel overseeing the respective budget with the appropriate supporting documentation. The Operations Office shall receive and process the requisition in a manner beneficial to the overall purpose of the schools. If the Operations Office denies a requisition, it will be returned to the person who originally entered it.

When a requisition receives final approval, the budgetary accounts will be encumbered and a purchase order will be sent to the respective vendor by the Operations Office. When the product or service has been procured the department that placed the order is responsible to receive for the product through the District's financial system. When the final invoice has been received by accounts payable, the amount due will be paid and the purchase order closed.

Check Requests

Certain circumstances allow for the use of a check requests. Some examples include employee reimbursements, insurance, transportation invoices and other miscellaneous transactions. All check request will be entered into the District's financial software by personnel overseeing the respective budget with the appropriate supporting documentation. The Operations Office shall receive and process the check request in a manner beneficial to the overall purpose of the schools. If the Operations Office denies a check request, it will be returned to the person who originally entered the request. When a check request receives final approval by the Operations Office, the invoice will be paid by accounts payable. Accounts with insufficient funds will be denied until a budget transfer is completed to cover the amount of the check request.

Reoccurring Invoice Entry

Invoices paid on an ongoing basis shall be entered by the Operations Office through a reoccurring entry. Some examples include water, sewer, gas, electric, propane and postage. Because of the ongoing nature of these transactions, they do not need monthly approvals by a District administrator.

Procurement Cards (Credit Cards)

Procurement cards may be issued to staff members to be used in purchasing goods and services solely and exclusively for the authorized business purposes of the District. Each staff member using a procurement card (P-Card) must first have signed a P-CARD USE AGREEMENT form.

The Assistant Superintendent of Operations shall establish procedures for staff to follow when using a P-Card. Staff shall be responsible for the proper use of a P-Card. Improper or unauthorized use of the purchasing privilege shall result in reduced credit limit or surrender of the card and may result in other disciplinary action up to and including termination.

Employees ordering goods or services by P-Card are responsible for reconciling their transaction within the District's financial software with the appropriate supporting documentation.

Receiving Goods

Each receipt of goods is to be inspected for possible damage and counted by the person responsible for receipt of product. The Operations Office shall be notified of all damage or discrepancies found by persons receiving materials or equipment.

Relations with Vendors

The Board wishes to maintain good working relations with vendors who furnish materials, supplies, and services to the School District. Vendor representatives should be acknowledged and interviews granted or not, depending on the circumstances. All communications should be answered or acknowledged promptly.

No purchase will be made from a member of the Board, nor from any member of his/her immediate household, nor from any enterprise in which s/he holds a substantial interest, except for public utilities and those purchases allowed by law. (Ref. 946.13, Wis. Stats.)

No employee or Board member shall endorse any product of any kind in such a manner as will identify him/her in any way as an employee of the School District unless approved by the Superintendent or the Board.

Payment for Goods & Services

Checks for all budget approved items shall be issued weekly. A list of checks will be submitted monthly to the Board for ratification.

Conflict of Interest

District purchases aggregating more than \$5,000 in a given year may not be placed with any firm in which a significant interest is held by any Board member, the Superintendent of Schools or other administrative personnel, or any employee of the District in a position to use, or recommend the use of the item or service purchased.

Purchasing Prior to Annual Meeting

The Board recognizes a need to continue the operations of the school District prior to final adoption of the fiscal year budget and setting of the District's tax levy. Therefore, approval is granted to place orders and continue operations before final budgets are adopted by the Board.

Quantity Purchasing

In an effort to obtain the most favorable purchase prices, the School District may utilize quantity purchasing, and competitive bidding when the quantity or cost of materials is great enough to warrant the time and expenditure involved. Quantity purchasing might be achieved through cooperative buying with other governmental units, other school districts, or consolidating purchases within the District. Standard bid lists may be developed in as many product areas as determined by the Operations Office.

Bids & Quotations

~~Written bids or quotations for materials or services may be sought when the quantity or cost of materials is great enough to warrant the time and expenditure involved. On purchases of high dollar value for which specifications can be reliably written, the quality gauged, and the quantity measured or counted, competitive quotations or bids shall be requested at the discretion of the Assistant Superintendent of Operations.~~

~~The Assistant Superintendent of Operations or his/her designee, may accept bids or quotations for supplies and materials, equipment and minor remodeling or maintenance projects.~~

~~Bidding for school building construction shall conform to Wisconsin Statutes and shall be preceded by a pre-qualification procedure. The Board, at a regular or special meeting, shall accept bids for construction contracts.~~

~~The Board reserves the right to accept or reject any or all bids, and to accept only those bids it deems most advantageous to the District.~~

Local Purchasing

~~The District shall cooperate with local merchants in offering them the opportunity to bid. Local purchasing will be given preference whenever the following factors are equal between local and non-local firms, businesses or vendors. However, administration still reserves the right to reject any or all quotations for any reason.~~

- ~~A. Quality of product~~
- ~~B. Conformance to specifications~~
- ~~C. Cost of product~~
- ~~D. Promptness of delivery~~
- ~~E. Service for maintenance, repair and guarantee of product~~
- ~~F. Dependability of supplier~~
- ~~G. Payment terms~~

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Legal 66.29, 66.293 Wis. Stats.
 48 C.F.R. Section 9.4

Cross References [ag6320A - PURCHASING](#)
 [ag6320B1 - PREPARING PURCHASE ORDERS](#)
 [ag6320C1 - BIDDING](#)

Last Modified by Ellen Suckow on April 6, 2026