Purchasing: Authorizing and Control

General

The purpose of this regulation is to implement Policy No. 6210. The Purchasing Department is hereby authorized to issue purchase orders for equipment, supplies, services and personal service contracts. The district shall not be responsible for purchases initiated other than via purchase order unless it is made with a District authorized procurement card (PCard).

Stock Catalog

A. All schools and departments will use the Lawson Requisition Center (RQC) catalog as the first source of supply.

B. The Purchasing Department will post a revised district warehouse stock listing to the Purchasing webpage on the District website on a monthly basis.

C. Whenever possible, users will adjust their requirements to use the standard supply items available through the district warehouse. Special preference items will not be provided through district funds except as approved, in advance, by the administrator in charge of Purchasing or designee. The decision may be appealed to the superintendent or their designee.

Submitting Requisitions

A. On-line requisitions for outside vendors should be prepared accurately and completely in Lawson RQC. Information should include the appropriate accounting and approximate price (enough to cover the budget impact). Although the Purchasing Department has the responsibility for selecting the actual vendor, requisitions should carry a suggested vendor and contact name, if appropriate, to facilitate processing.

B. RQC requisitions first go to Purchasing for vendor review and comments, then Finance for an accounting review, then to the Budget Responsibility Authority (BRC) for approval. Once received at Purchasing, requisitions will be processed within a maximum of two (2) working days.

C. The Purchasing Department has the right and responsibility to select requisitions that will be included in a bid call.

D. Bids are to be processed within thirty (30) days.
Vendor Selection

A. Requisitions shall include a recommended vendor, along with the name of a contact person, if appropriate.

B. The Purchasing Department has responsibility for selecting the actual vendor, which may be different from the recommended vendor depending on research conducted by the Purchasing Department.

Levels of Purchasing Authority

A. Purchases of goods (other than books) at or above $75,000 are to be bid by the Purchasing Department in accordance with laws and regulations of the state of Washington.

1. The administrator in charge of Purchasing or designee will advertise bids for two consecutive weeks in a newspaper of local circulation and/or a Web site.

2. The board of directors will make awards of $200,000 or more.

B. Purchases for goods or services at or above $40,000 but below $75,000 are to be quoted by the Purchasing Department in accordance with laws and regulations of the state of Washington. Award of contract will be the responsibility of the administrator in charge of Purchasing or designee.

C. Purchases below $40,000 are to be approved, in advance, by the Purchasing Department and must be authorized by a purchase order number prior to commitment except as listed in this regulation.

D. If Federal funds are used for grant related purchases of goods and/or services, then purchasers must follow the competitive bid laws and regulations of the federal government. Contact the Purchasing Department for assistance with meeting the federal bid laws and regulations as soon as you are aware of a requirement that will utilize federal funds.

E. Principals or designees may use imprest or petty cash accounts for Associated Student body (ASB) purchases of $50 or less, providing they follow guidelines issued by the Purchasing Department.

F. Purchases may be made with district procurement cards based on district guidelines.

G. Only confirmed purchase orders issued by the Purchasing Department will be recognized. All other confirmed requisitions will be returned to the BRC authority and charges may be the responsibility of the staff person.
H. Staff members purchasing goods or services for the District with personal funds may request reimbursement by completing the Employee Reimbursement Claim Form.

I. All trade-ins will be approved by the administrator of Purchasing or designee.

J. Changes to Existing Contracts. In the event a change (or cumulative changes) exceeds the original contract amount by more than twenty percent, a new solicitation should be considered, and a sole source justification must be written and approval obtained if new competition is not obtained. In most cases, this will consist of a simple memo justifying why it is impracticable to obtain competition. Changes shall be approved at the level appropriate to the particular change (e.g., a $20,000 change to a $150,000 contract requires Cabinet Level Administrator signature with approval of initiating Administrator’s Supervisor approval), unless the cumulative total amount causes the contract to move to the next higher threshold. Formal Board of Directors approval is not required unless the cumulative additional amount exceeds $200,000. Notwithstanding the preceding sentences, changes shall not be separated or divided so as to avoid the requirements for higher management approval.

Contact with Vendors

A. Employees are allowed to contact vendors to obtain information on potential purchases and to provide information necessary to complete a requisition. Schools and departments are encouraged to contact the Purchasing Department early in the process when exploring a potential purchase because Purchasing staff may be able to save time and suggest vendors.

B. All bidding and quoting are to be done exclusively by the administrator in charge of Purchasing or designee. Other employees should take care to avoid suggesting to vendors that informational figures are really quotations.

Urgent and Emergency Orders

A. Urgent Order: When an urgent requirement or situation occurs that requires immediate action, contact Purchasing to request response actions for an urgent order.

B. Emergency Order: If the requirement is in response to unforeseen circumstances beyond the control of the school or department which present a real, immediate, and extreme threat to the proper performance of essential functions or which may reasonably be expected to result in excessive loss or damage to property, bodily injury, or loss of life, then follow the instructions in the Emergency Purchasing section of this regulation.

C. Both urgent and emergency orders should be submitted by using Lawson RQC. The requester should then contact Purchasing for expedited processing. In the event of system
failure, urgent orders may be brought to the Purchasing Department between 6:30 a.m. and 4:00 p.m. The administrator in charge of Purchasing or designee will evaluate the authenticity of the emergency. If a bona fide emergency exists, the Purchasing staff will set aside ongoing work and the requisition will be processed immediately.

Associated Student Body (ASB) Requisitions

A. Associated Student Body (ASB) requisitions will be processed by the Purchasing Department in the same manner as all other requisitions using Lawson RQC.

Receiving Goods

A. All purchase orders for items being purchased, except items from the district warehouse, must be received in Lawson RQC.

B. Principals or department heads are responsible for establishing receiving persons and locations within their buildings. These persons must have security rights in the Lawson system allowing them to receive items in the requisition module.

C. Since receiving goods is an important phase of the procurement cycle, principals/department heads are required to supervise the process in their buildings so that receiving documents and RQC system entries are completed correctly and maintained at their site.

Receiving Services

A. The Lawson system does not allow for services to be received in the system. Therefore it is important for schools and departments to verify and keep a record of purchases for services.

B. It is the responsibility of the BRC authority to ensure services have been received, including the performance of all requirements, prior to invoices for payment being approved.

C. Once the receipt of services has been verified, acceptance is accomplished by indicating “Okay to Pay” on the invoice(s) followed by a signature and legibly printed name. The person signing the invoice must be the BRC authority or designee (designees must be authorized in writing and placed in a file for audit purposes.) In addition, the person signing the invoice must confirm that the services were performed in accordance with the contract or purchase order prior to authorizing payment.

D. If the service provider has failed to meet contract or purchase order requirements, contact the Purchasing Department for assistance in resolving this problem.
Return of Merchandise

A. The Purchasing Department shall be responsible for coordinating the return of merchandise for all schools and departments.

B. Authorization for a return as well as instructions is to be obtained from the Purchasing Department before school or department contacts the vendor or moves the items.

Professional Services Contracts

A. A professional services contract that exceeds a total of $200,000 is to be submitted to the board of directors for approval.

B. All professional services contracts, prior to services being performed, must be signed by the superintendent or designee.

C. Work on a professional services contract must not commence until the Purchasing Department issues a purchase order covering the work.

Developing Bids

A. It shall be the responsibility and right of the Purchasing Department to establish procedures for bids and quotes.

1. The Purchasing Department has the responsibility and right to combine requisitions to develop bid quantities.

2. Schools and departments shall be responsible for responding to requests from the Purchasing Department for participation in annual bidding by submitting requisitions in a timely manner.

B. It shall be the responsibility and right of the Purchasing Department to review specifications submitted by schools and departments and to make appropriate modifications so that vendor competition can be as fair and open as possible. Modifications must be mutually agreeable.

C. The board may, by resolution reject any and all bids and make further calls for bids in the same manner as the original call.

Emergency Purchases

A. The District may need to make emergency purchases in response to unforeseen circumstances beyond the control of the school or department which present a real, immediate, and extreme threat to the proper performance of essential functions or which
may reasonably be expected to result in excessive loss or damage to property, bodily injury, or loss of life. If an emergency purchase would normally require bids or quotes in accordance with RCW 28A.335.190, the Board of Directors may waive the requirement by issuing a resolution declaring the existence of an emergency prior to the purchase. Activities needing to conduct an emergency purchase must complete and submit a Declaration of Emergency Purchase Form [insert link] through the Purchasing Department to the Superintendent requesting a resolution from the Board.

Public Works

A. The Purchasing Department will establish procedures in accordance with the laws and regulations of the state of Washington.

B. All public works bids and quotes will be issued, opened and awarded by the Purchasing Department. The board of directors will approve all public works bids in excess of $200,000. All public works $200,000 or less will be awarded in accordance with laws and regulations of the state of Washington. All telephone quotes will be documents.

C. Public works projects greater than $40,000 but less than $100,000 will be awarded using the small works roster procedures per RCW 39.04.155 unless an exception is granted by the Purchasing Department.

D. The Purchasing Department will initiate and maintain the small works roster for the district in accordance with laws and regulations of the state of Washington. Under (Municipal Research and Services Center of Washington) MRSCrosters, which is a shared statewide public works and consultant roster database; the Purchasing Department uses to manage and maintain those vendors who wish to be current on our small works roster to participate in quotes.

Architectural and Other Professional Services

RCW 39.80 requires that architectural, landscaping and engineering services be contracted according to certain procedures which required the selection of the “best qualified” firm before price is considered. Procurement of such services is handled by the Department of Planning and Construction and such contracts shall be executed by the Executive Director of General Support Services.
Legal References:

RCW 28A.335.190 Advertising for bids – Competitive bid procedures – Telephone or written quotation solicitation, limitations – Emergencies
RCW 39.04.155 Small works process, Chapter 286, Laws of 2005
RCW 39.10 Alt. Public Works (GCCM, Design Build, JOC)
RCW 39.04.270 Competitive Negotiation (low voltage)
RCW 39.80.040 Architect Selection
RCW 39.04.290 Building Engineering Systems
RCW 28A.330.100 Additional Powers of the Board (Selection of attorneys, business managers, etc.)

Approved by Cabinet on 4/21/2015