

NEW CANAAN PUBLIC SCHOOLS

PURCHASING POLICY

PURPOSE: The New Canaan Public Schools recognizes the importance of maximizing the use of district resources, the need for sound business practices in spending public money, the requirement of complying with applicable laws governing purchasing, the importance of standardized purchasing practices, and the need for clear documentation.

Within the framework of applicable laws and regulations, purchases and use of material and other resources shall be accomplished in accordance with sound business practices with the primary purpose of serving the educational interests of student programs of instruction.

This policy applies to all publicly generated funds and appropriations, and excludes all student activity accounts.

AUTHORITY: The duties of purchasing shall be centralized under the Director of Finance and Operations (DOF) who shall be responsible for all purchase transactions for the district. The Superintendent of Schools or designee or the DOF or DOF designee shall sign purchase orders. For the purpose of this policy, only the DOF shall be deemed the designee of the Superintendent for the signing of other purchase obligations such as contracts.

The DOF is the designated representative of the Superintendent of Schools to act with the Finance Director of the Town to maximize economies of purchasing through sharing of purchases in areas deemed practical by NCPS Superintendent of School and in the best interests of NCPS.

PURCHASING GUIDES: New Canaan Public Schools' (NCPS) purchasing procedures will have the best interest of the educational interests of students as the base and include, but not be limited by, the following:

1. Specifications and needs of the user;
2. Best possible quality;
3. Lowest possible cost;
4. Availability when needed;
5. Efficient use of time of staff;
6. Energy efficiency of product;
7. Compliance of suppliers with equal employment opportunity and other Board policies;

To the greatest extent possible and practical, all purchases of goods and services with district funds should be made on a properly executed district purchase order or contract issued by the DOF.

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Certain purchases are exceptions to the normal purchasing process and do not require a purchase order. The following items do not require a purchase order:

1. Payment of utilities
2. Mileage/travel expense reimbursement
3. Association dues and subscriptions
4. Conferences and training
5. Payroll tax, unemployment and Medicaid payments
6. Employee tuition reimbursements
7. Expedited mailings
8. Non-employee referee, event support and test proctor compensation
9. Goods or services acquired from BOE or Town departments
10. Bank and credit card fees
11. Payments to universities for interns or scholarship awards
12. Reimbursements made pursuant to collective bargaining agreements
13. Reimbursements for other miscellaneous expenses

MAINTENANCE OF OPEN PURCHASE ORDERS: Throughout the year and at year-end, open POs will be reviewed and adjusted as necessary. If a purchase order is increased or decreased, a revised PO will be sent to the vendor.

VENDOR GUIDELINES: New Canaan Public Schools (NCPS) does not maintain a formal list of approved vendors. However, NCPS encourages the use of vendors in collaboration with CREC, PEPPM, Sourcewell (formerly NJPA), Omnia Partners, CT Library Consortium, NCPA and other cooperative purchasing groups to maximize cost/benefit. Staff members are allowed to use other vendors, provided the proper guidelines are followed.

Transportation Vendors: With safety as our number one concern, we have compiled a list of NCPS Approved Transportation Companies. These vendors have been reviewed and should be used for all school-related functions, whenever possible.

CT Limo	Hoyt Livery
Dattco	Elite Limousine
First Student	We Transport
American Tour and Travel	

All contracts must be signed by either the Director of Finance & Operations, or the Superintendent of Schools

New vendors: New vendors are reviewed and selected in collaboration with the Business Office and the school or department requesting goods or services. Before a new vendor can be used, a W9 and contact information must be submitted to the Purchasing Coordinator or Purchasing

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Secretary. The Purchasing Coordinator or Purchasing Secretary provides vendors with a memo outlining the district's Purchase Order policy unless there is an exception to this rule. Exceptions may include reimbursements to SPED parents per agreements, payments made to SPED providers pursuant to service agreements or student awards under \$600. The staff member obtains quotes and submits the quote through the Purchase Requisition Process.

QUANTITY PURCHASING: To help achieve both quality control and the price advantages of quantity purchasing, the administration is encouraged to:

1. Set specifications for goods as needed. Cite several existing, commercially available "standard brands" that meet those specifications and qualifications acceptable as examples.
2. Invite and/or advertise for vendors to bid on those examples, or comparable ones which the vendors believe to be acceptable according to the specifications.

BIDDING: The following competitive quoting and bidding guidelines shall be used whenever possible and practical.

1. Purchases totaling between \$5,000 and up to \$10,000, at least three (3) verbal price quotations, if available.
2. Purchases totaling *over* \$10,000 and up to \$15,000, formal written quotations from at least three (3) separate vendors, if available.
3. Purchases above \$15,000, formal *sealed* bid(s).
4. The following types of purchases may be exempt from competitive bidding:
 - a. Purchases under \$5,000;
 - b. Emergency purchases;
 - c. Goods purchased from state agencies, such as furniture produced by the State Department of Corrections;
 - d. Goods and services purchased under state contracts;
 - e. Goods and services purchased using collaboratives involving federal, state, local governments and regional entities;
 - f. Surplus and secondhand purchases from another governmental entity;
 - g. Sole source goods, services and software;
 - h. Purchases to maintain equipment and software consistency;
 - i. Textbooks and other programmed instructional materials as only one source generally exists;
 - j. Professional, specialized and preventative maintenance service providers;
 - k. Services where the engineering costs required to develop specifications for a competitive bid are significant in relation to the scope of the project;
 - l. Purchases to protect the health and safety of the school community, or the integrity of school property; and

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- m. Any purchase, if in the opinion of the Superintendent of Schools or the DOF, and after notification and acknowledgement by the Educational Resources Committee of the Board of Education, is in the best educational interest of the district.
- n. Continuity of service

Legal Reference: Connecticut General Statutes
10-220 Duties of boards of education
10-222 Appropriations and budget
Conflict of Interest Policy, New Canaan Board of Education

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