

ADMINISTRATIVE POLICY

The online version of this policy is official.
Therefore, all printed versions of this
document are unofficial copies.

PURCHASING

This policy directs compliance with Tennessee Code Annotated 49-2-203, and provides for the establishment of procedures for efficient and unbiased business transactions for CMCSS, to include all funds, departments, and schools. For further reference, please refer to [PUR-G002](#), Guidelines for the Implementation of Purchasing Policy.

- A. Spending Plan. The annual budgets shall constitute the spending plan for the year. The Chief Financial Officer or designee is authorized to approve purchases in accordance with budget allocations. The Board shall not be responsible for payment of any material, supplies, equipment, or services purchased by unauthorized individuals or in a manner not prescribed through this policy.
- B. Limits on Approval Authority. Single, non-budgeted purchases or expenditures exceeding \$25,000 shall be approved by the Board. Purchases meeting these criteria of an emergency nature shall be approved by executive order in accordance with Board Governance Policy. The Chief Financial Officer or designee shall approve all other purchases.
- C. Bidding: Bids will be awarded on the basis of the lowest and best bid meeting specification. Vendor discounts shall be considered when determining lowest bidder. In the event that the best bid is not the lowest bid, the using department shall provide written justification to the Chief Financial Officer or designee. **For detailed information, please refer to [PUR-G001](#), General Bid Requirements.**
 1. Formal Bids
 - a. Expenditures exceeding \$25,000 and which can be provided by more than one vendor or service provider shall be based on competitive bids. Such bids shall be termed 'formal bids,' and shall be publicly opened and read aloud at designated times. Purchases of like items shall be aggregated for purposes of the bid threshold.
 - b. The Purchasing Office shall periodically advertise in a newspaper of general circulation in the county for vendors and shall update the list of vendors following such advertisement as specified below in Section F.
 2. Informal Bids (Verbal/ Electronic): Purchases of \$10,000 or less, but more than \$2,500 may be made without newspaper notice, but whenever possible, shall be based on at least three competitive bids. Such bids shall be classified as 'informal bids,' and need not be publicly opened. Telephone and/or online quotations may be used for informal bids.
 3. Informal Bids (Written): Purchases of \$25,000 or less, but more than \$10,000 may be made without newspaper notice, but whenever possible, shall be based on at least three competitive bids. Such bids shall be classified as 'informal bids,' and need not be publicly opened. Written quotations are required.
 4. Emergency Bids: Emergency items are those items that affect health, safety, and continuous operation of the District. If biddable, bids shall be in accordance with C.2, above.

5. **Bid Bonds:** The Chief Financial Officer or designee shall require a bid bond not to exceed ten percent of the total for bids or contracts of \$25,000 or more for construction bids or at the Chief Financial Officer or designee's discretion.
 6. **Bid Protest:** A person may submit a protest within two weeks of the awarding of a formal bid. The protest shall be in written form and submitted to the Director of Schools for consideration.
- D. Purchases with Federal Funds:** All acquisitions made using Federal funds shall comply with guidelines under Uniform Grants Guidance Montgomery County, GRT-G001, so that the school system complies with Federal Uniform Grant Guidance, C.F.R. §200.317 - §200.326.
1. Prior to making a purchase, purchaser is encouraged to search for Federal excess and surplus property in lieu of purchasing new when feasible and when it would reduce project costs.
 2. All purchases must be bid as applicable according to Section C of PUR-A001 policy.
 3. Requests for sole source/single source determination must be submitted to the Purchasing Director for review and approval prior to completion of a requisition.
 4. All records relating to the purchase must be maintained and retained for audit purposes. Purchaser may scan and attach the documentation to the requisition in MUNIS or maintain a hard copy of the records at his/her office.
- E. Exemptions from the Bidding Process:** Legal services, advisory services, educational consultants, and other professional services are exempt from the bidding process, but shall be awarded on the basis of recognized competence and integrity.
- F. Vendor List:** The Purchasing Office shall compile and maintain a list of vendors who supply goods and services to the District. This list shall constitute the mailing list for bid solicitations. Reputable vendors may be added to the list upon request and upon proof of ability to provide the respective goods and/or services. Vendors who fail to submit bids pursuant to three successive solicitations or who fail to perform according to contract shall be removed from the list.
- G. Equal Opportunity:** It is the policy of the Clarksville-Montgomery School System (CMCSS) not to discriminate against any student, employee, or applicant on the basis of sex, marital status, race, color, creed, national origin, sexual preference or handicapping condition.
- H. Funding for Replacement of Band Uniforms:** It is the policy of CMCSS to provide no more than \$21,000 or fifty percent (50%) funding from the General Purpose Fund for band uniforms being replaced, with the stipulation that the uniforms be at least ten (10) years old.
- I. Conflicts of Interest:** No employee is to be financially interested, or have any direct personal beneficial interest in any contract or purchase order for any supplies, materials, equipment or contractual services used by or furnished to the school system. The issuance of a purchase order or use of a P-Card for items for personal use is prohibited.
- J.** All CMCSS employees making purchases using either the informal or formal bid process must sign a Conflict of Interest Declaration ([PUR-F018](#)).
- K.** All CMCSS departments and schools and funds will comply with federal, state, and local laws, rules, and regulations.

Implementing Procedures: [PUR-P004](#) Formal Bid
[PUR-P009](#) Informal Bid
[PUR-P006](#) Selection, Evaluation & Re-Evaluation of Vendors
[PUR-P007](#) Procurement Card Purchasing Procedure

Associated Documents: [PUR-F018](#) Conflict of Interest Declaration
[HUM-A069](#) Conflict of Interest
 GRT-G001 Uniform Grants Guidance Montgomery County

Revision History:

Date:	Rev.	Description of Revision:
2/13/04		Initial Release
8/10/04	A	Add H. Conflicts of Interest
4/12/05	B	Add Attachments A & B
11/7/11	C	Changed \$500 to \$1,000 under Informal Bids. Replaced entire B. Limits on Approval Authority. Added PUR-P007 to Implementing Procedures. Updated logo and corrected formatting.
6/11/12	D	Add "or designee" to A, B, C, and #4
8/20/12	E	Change Attachment A to PUR-G002 and Attachment B to PUR-G001
10/13/14	F	Added C.5 regarding Bid Protest; updated logo
8/17/15	G	Added I, Conflict of Interest Declaration.
10/26/15	H	Added PUR-F018, PUR-P009, and HUM-A069 to associated documents. Updated amounts under formal and informal bids. Added section on written informal bids.
9/26/16	I	Addition of part J. Updated hyperlinks to associated documents.
5/1/17	J	Added part F, Certified Vendors List. Added dollar amount to funding for replacement of band uniforms.
6/12/18	K	Added section D, "Purchases with Federal Funds". GRT-G001 added to associated documents.
12/2/19	L	Added verbiage to require purchases of like items be aggregated, Item C.1.a. Revised Informal Bid limit, Item C.2. Added verbiage clarifying bid bond only for construction bids, Item C.5. Deleted part G, Certified Vendor List. Added procurement cards to part J. prohibiting personal use.

***** End of Policy *****