



## **FORMAL BID PROCEDURE (PUR-P004)**

Clarksville-Montgomery County School System

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### **1.0 SCOPE:**

- 1.1 This procedure outlines the manner in which all purchases for amounts of more than \$25,000 are secured when the purchase can be obtained from more than one vendor or service provider.

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

### **2.0 RESPONSIBILITY:**

- 2.1 Purchasing Director (PD)
- 2.2 Facilities Manager
- 2.3 Assistant Facilities Manager

### **3.0 APPROVAL AUTHORITY:**

- 3.1 Chief Financial Officer (CFO)

### **4.0 DEFINITIONS:**

- 4.1 Special Purchase: Purchases exceeding \$25,000 that are not routine and not previously approved in the budget. Examples include capital expenditures, such as buildings and vehicles, or items for long-term use.
- 4.2 Lowest and Best Price: The lowest price bid needs to meet the specified criteria of the item/service identified. If the bid does not meet criteria the next lowest price is evaluated.

### **5.0 PROCEDURE:**

- 5.1 Any CMCSS employee requesting a purchase for an amount exceeding \$25,000 must provide written specifications to the Purchasing Director.
  - 5.1.1 Purchasing Director will send a copy of the approved vendor list and Conflict of Interest Declaration form ([PUR-F018](#)) to the employee initiating the purchase request for review and signature. The immediate supervisor and Department Chief are also required to review the vendor list and sign form PUR-F018.
    - 5.1.1.1 Should the employee, immediate supervisor, or Department Chief determine that any of the approved vendors pose a potential conflict of interest, the Department Chief would notify the Director of Schools. The Director, in consultation with in-house legal counsel, would then make a determination regarding the potential conflict. In the event a conflict exists, viable options to eliminate the conflict will be studied and a resolution identified for moving forward. If a conflict does not exist, the bid process would continue with the Department Chief signing form PUR-F018 and returning form to the Purchasing Director.
  - 5.1.2 The Purchasing Director must sign the Conflict of Interest Declaration (PUR-F018) having reviewed the approved vendor list, enter the Purchase Order number and file with the



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related purchasing documents. As above, should the Purchasing Director perceive a potential conflict, the Director of Schools will be notified for resolution.

5.1.3 Specifications are reviewed for accuracy and funding availability is confirmed.

5.2 Vendors from the prospective bidder list are mailed an Invitation to Bid (PUR-F005).

5.3 Bids are required to be returned to CMCSS by the date and time specified in the bid request. Time of return is determined based on nature of the goods or services requested and/or the complexity of the specifications. Bids are generally required to be returned within 2 weeks.

5.4 Bids are publicly opened at the designated time.

5.5 The Purchasing Director:

5.5.1 Evaluates the bids for the lowest and best price, and

5.5.2 Recommends the awarding of the bid.

5.6 If the purchase is not a special purchase, the Purchasing Director initiates a purchase request (ref. [PUR-P002](#)).

5.7 Special purchases are reviewed by the School Board for approval.

5.7.1 If the board does not approve the special purchase, the bid is canceled and the vendor notified.

5.7.2 If the School Board approves the bid, the Purchasing Director initiates a purchase request (ref. [PUR-P002](#)).

5.8 If the project involves construction/alteration of CMCSS facilities and/or grounds, the Facilities Manager must be contacted and the Facility Construction/Alteration Procedure must be followed (FAC-P004).

### **6.0 ASSOCIATED DOCUMENTS:**

6.1 Conflict of Interest Declaration Form ([PUR-F018](#))

6.2 Invitation to Bid (PUR-F005) not available via web

6.3 Purchase Order Procedure ([PUR-P002](#))

6.4 Bidders List

6.5 Conflict of Interest ([HUM-A069](#))

6.6 Facilities Construction/Alteration Procedure (FAC-P004)

### **7.0 RECORD RETENTION TABLE:**



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<b><u>Identification</u></b>	<b><u>Storage</u></b>	<b><u>Retention</u></b>	<b><u>Disposition</u></b>	<b><u>Protection</u></b>
Formal bid file with bid request form and PUR-F018.	File cabinet or vault	Current plus six years	Recycled	Secured Building

### **8.0 REVISION HISTORY:**

<b><u>Date:</u></b>	<b><u>Rev.</u></b>	<b><u>Description of Revision:</u></b>
2/13/03		Initial Release
3/03/03	A	Correct numbering in 5.7
10/02/08	B	Replacing PUR-F011 with PUR-F005 in 5.2 and Associated Documents, update flowchart
11/11/11	C	Changed "Agent" to "Director", changed wording on more than \$10,000. Updated logo.
10/8/15	D	Added conflict of interest information and form. Updated associated documents. Changed formal bid amount to 25,000.
9/25/18	E	Added references to Facilities involvement regarding construction/alteration of CMCSS facilities and/or grounds.

**\*\*\*End of Procedure\*\*\***