



INFORMAL BIDS PROCEDURE (PUR-P009)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the process for initiating a purchase request requiring three bids (purchases between the amounts of \$2,500 and \$25,000).

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 Department Chiefs
2.3 Immediate supervisor

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Financial Officer (CFO)

4.0 DEFINITIONS:

- 4.1 None

5.0 PROCEDURE:

- 5.1 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.
- 5.2 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.
- 5.3 **School site employees** - A school site employee initiating a purchase request requiring three quotes (informal bid – purchase with a price range between \$2,500 and \$25,000) is responsible for signing Conflict of Interest Declaration form ([PUR-F018](#)).
- 5.3.1 The signed and dated form is provided to the School Bookkeeper and they, along with the Principal, must sign form [PUR-F018](#). The Bookkeeper is also responsible for filling in the Purchase Order number or and vendor name. The Bookkeeper files the completed form with the related purchasing documents.
- 5.4 **Non-School Site Employees** - A non-school site employee initiating a purchase request (informal bid – purchase with a price range between \$2,500 and \$25,000) is responsible for signing a Conflict of Interest Declaration form ([PUR-F018](#)). The signed and dated form ([PUR-F018](#)) is then provided to their immediate supervisor for their signature, the Requisition number, and vendor name for purchases covered by the informal bid process. The completed form is then forwarded to the Department Chief for signature and filed with the related purchasing documents.



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6.0 ASSOCIATED DOCUMENTS:

- 6.1 Conflict of Interest ([HUM-A069](#))
- 6.2 Purchasing ([PUR-A001](#))
- 6.3 Conflict of Interest Declaration Form ([PUR-F018](#))
- 6.4 Purchase Order Procedure ([PUR-P002](#))

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Informal bid file with PUR-F018	File cabinet or vault	Current plus six years	Recycled	Secure building

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/9/15		Initial Release
11/20/15	1	Updated informal bid limits to match policy, PUR-A001.

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