

The procurement and purchasing process generally involves (1) budgeting and other planning for expenditures, (2) evaluating needs and identifying general options that would address a need, (3) selecting a method of procurement and following other procurement procedures for a specific purchase or contract, (4) making an actual purchase or entering into a binding procurement-related contract on behalf of the District, and (5) authorizing and making an actual disbursement of funds from the District treasury in order to pay for a purchase or contractual procurement of services, supplies, equipment, or other property.

Assuming an authorized method of procurement has been followed (as established by applicable law and under District policies and procedures), the School Board authorizes the District to make purchases and supervise the purchasing of all goods and services for the District in accordance with state law and good purchasing practices. The building principal shall supervise purchasing at the school level and approve requisitions for goods and services that have been approved by the Board in the District's annual operating budget.

Limitations on District administration purchasing authority are as follows:

- 1) Administration will use a competitive bid process on all purchases of supplies, materials, equipment, and any contracted services -- except professional services--- for all transactions that exceed \$50,000.00.
- 2) Any single transaction that is \$200,000 or more shall be approved by the Board of Education.
- 3) A transaction that involves the District's purchase, lease, or other acquisition of real estate, a building/facility, or some other interest in real estate also generally requires authorization by a vote of the electors at an annual or special meeting.

In a situation involving a public exigency or emergency, the Superintendent may approve an emergency procurement and promptly notify the Board of his or her emergency action.

For all procurement transactions that do not require specific, advance Board approval under this policy and for which the Board has not provided any more

specific direction, the Director of Finance and Operations may make a final purchase, execute a binding procurement contract, or authorize a designee to make such a purchase or execute such a contract on behalf of the District.

No order check, share draft, or other draft or actual disbursement of District funds can be made from the District treasury and the depositories in which the treasury's funds are maintained except in compliance with state law and with the District's policies and procedures governing such disbursements.

It shall be the goal of the District to secure goods and services at the lowest price available whenever possible. In addition to price, consideration shall be given to such factors as the quality of the product or service, vendor conformity to specifications, service record, delivery terms and general suitability to the requirements and needs of the District. The District may reject the lowest price or bid if any of these factors prove unsatisfactory.

All things being equal and as permissible by law, the District will give preference to agents, vendors, or manufacturers residing in the school district who maintain an office in the school district and employ at least one full-time employee. The District reserves the right to prequalify all bidders, agents or vendors, and to determine whether or not the designation as a local business is met. It is the intention of the Board that all purchases be made in such a manner that all qualified vendors have an equal opportunity.

The District's procurement agents have authority under this policy to make certain purchases and to enter into certain procurement contracts on behalf of the District without obtaining specific, advance approval from the Board – including especially those relatively routine purchases that are within the budget appropriations that have been previously approved by the Board. Nonetheless, the Board also expressly encourages the administration to communicate any procurement decision to the Board whenever the administration determines that the procurement decision is particularly important or non-routine. Further, the authority granted to the administration and to District purchasing agents under this policy does not exempt such individuals from being evaluated on their exercise of sound judgment in connection with the use of such authority.

Legal References:

Wisconsin Statutes

[Section 66.0135](#) [contracts and orders, receipt of invoices, and payments]

- [Section 66.0607](#) [withdrawal or disbursement from local treasury]
[Section 120.10](#) [powers of the annual meeting, including authorizing or directing the district to purchase/provide certain property or services]
[Section 120.16](#) [school district treasurer duties, including procedures for disbursements from treasury and funds transfers]

Federal Law

- [2 C.F.R. Part 200 Subpt. D](#) [post-award requirements under the federal Uniform Guidance]
[2 C.F.R. §200.318](#) [general standards for procurement supported by federal funds]
[2 C.F.R. §200.319](#) [written procurement standards required]

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