

NOVATO UNIFIED SCHOOL DISTRICT

Board Policy

Series 3000

BP 3310

BUSINESS SERVICES

PURCHASING

Purchasing Procedures

The Superintendent or designee shall maintain effective purchasing procedures in order to ensure that maximum value is received for money spent by the district and that records are kept in accordance with law.

Insofar as possible, goods and services purchased shall meet the needs of the person or department ordering them at the lowest price consistent with standard purchasing practices. Maintenance costs, replacement costs and trade-in values shall be considered when determining the most economical purchase price.

(cf. 3314.2 Revolving Funds)

(cf. 3440 Inventory)

All purchases shall be made by formal contract or purchase orders, or shall be accompanied by a receipt.

(cf. 3300 Expenditures/Expending Authority)

(cf. 3312 Contracts)

All contracts and purchases must be approved or ratified by the Board.

The Superintendent or designee may enter into contracts and purchases on behalf of the District. The Board shall adopt an operating budget and a capital budget providing funds to purchase supplies and equipment for schools and departments for the entire school year. It is expected that those budgeted amounts will be sufficient to meet the needs of the various departments for the given school year. Purchases exceeding these budgeted amounts may not be made without ~~prior~~ approval of the Board. Prior approval must be obtained if there are not sufficient funds to cover the excess costs in any other account except unrestricted unappropriated ending balances.

The procurement function is one of the major business responsibilities of the Board of Trustees.

The Board has the authority and responsibility for all purchases of the District. This authority and responsibility can be delegated, in accordance with law.

The purchasing authority and responsibility is to be centralized under the Chief Financial Officer or designee or such other person officially designated by the Board of Trustees.

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Legal References:

EDUCATION CODE

17604 Delegation of powers to agents; approval or ratification of contracts by governing Board

17605 Delegation of authority to purchase supplies and equipment

35250 Duty to keep certain records and reports

39656 Delegations of powers

39657 Delegations of authority

39510 Disposal of property

GOVERNMENT CODE

3410 U.S. produce and processed foods

PUBLIC CONTRACT CODE

20111, 20112, 20115, 22002, 20118.3

Board Approved: February 20, 2001

NOVATO UNIFIED SCHOOL DISTRICT

Administrative Rules and Regulations

Series 3000

AR 3310

BUSINESS SERVICES

PURCHASING

1. General

- A. The Purchasing Officer(s) will ensure that purchases are made within the limitations prescribed by law, by legal options, and in accordance with Board policies.
- B. Four fundamental functions of the Purchasing Department are:
 - 1) Buy the proper product for the purpose required;
 - 2) Have the product available when and where needed;
 - 3) Buy the proper quantity of the product; and
 - 4) Pay the lowest reasonable price, consistent with.
Maintenance costs, replacement costs, and trade-in values shall be considered when determining the most economical purchase price.
- C. Specifications governing supplies, equipment and services are a joint responsibility of the department/site making the purchase and Business Departments. In the procurement function, the Purchasing Officer(s) should ensure that the items and services specified will meet the needs of the program making the purchase. Standardization, where possible, shall be the goal.
- D. All purchases shall be made by formal contract, purchase orders, or be accompanied by original receipt.

II. Preferred Products

Whenever recycled products of equal fitness and quality are available at no more than the cost of non-recycled products, the district shall purchase recycled products. The district also may give preference to the suppliers of recycled products.

Price, fitness and quality being equal, the district shall give preference to supplies manufactured, grown, or produced in California, and shall next prefer supplies partially manufactured, grown or produced in California.

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When purchasing food, the district shall give preference to produce grown in the United States and/or processed in the United States insofar as this is economically feasible considering the total cost, quantity and quality of the food.

III. Specific Purchasing Assignments

- A. The Chief Financial Officer or designee approves all purchases made by formal contract or purchase order for the District.
- B. The Purchasing Department shall establish practical and efficient office procedures, reports, records and systems that will allow the department to give maximum effort to the acquisition of supplies, equipment and services for the educational program and assist the administration in its role of management.
- C. The Purchasing Department shall, when warehousing responsibilities are assigned, maintain a system of warehouse inventory control to account for available equipment and supplies. A catalog of current warehoused items should be maintained and distributed to all departments annually.
- D. The Chief Financial Officer or designee shall handle the disposal of all personal property declared surplus or obsolete by the Board of Trustees in accordance with Education Code 39510.

IV. Purchasing and Staff Relationships

- A. Only the Chief Financial Officer or designee has the authority to commit the expenditure of funds for supplies, equipment and services.
- B. Purchases made directly by district employees should be avoided. When this does occur, reimbursement will only occur when accompanied by the original receipt.
- C. The Purchasing Department shall strive constantly to increase its knowledge of new equipment, materials, services, sources, prices and processes in manufacturing, and should keep other departments informed.
- D. It is the responsibility of each department to determine the quality and kind of supplies, equipment and services required; however, the Purchasing Department may question and/or make recommendations relative to quality, safety, health and economy.

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V. Purchasing and Vendor Relationships

- A. Opportunity shall be provided to all responsible vendors to do business with the district. Visits should be promptly acknowledged and interviews granted, depending upon the circumstances. The Purchasing Officer(s) should let the vendors know the officer's preference in handling visits.
- B. Employees of the district shall not extend favoritism to any vendors. Each order should be placed on the basis of quality, price, service, delivery, and any other applicable factors.
- C. Employees of the district shall not receive funds, gifts, use of any facilities or materials from vendors for personal gain or favor, or publicly endorse or promote commercial products.
- D. The Purchasing Officer(s) shall visit suppliers' place of business when feasible to acquaint themselves with the product lines carried and with the vendors' ability to serve the district.
- E. Open purchase orders, given to a local merchant to cover no more than six month's purchase of miscellaneous items may be used. Purchase orders must list authorized purchasers, date purchase order will cover and have a maximum amount listed covering that specific period of time.
- F. All equipment, supplies and services purchased by the District shall be used for district needs only.

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