



**ADRIAN PUBLIC SCHOOLS
Policies**

NEPN Code: DJF-R

Fiscal Management

ADMINISTRATIVE GUIDELINES FOR PURCHASING

Purpose

These guidelines and procedures assure a smooth and functional purchasing system. For the system to be effective, every individual and user agent must comply with the guidelines and procedures. The Business Office will not make any exception to these guidelines and procedures except in an emergency.

1. All purchases must be on a purchase order.
 - a. Purchases made without purchase orders will not be honored by the Assistant Superintendent and may result in a personal expense for an employee who does not follow the guidelines.
 - b. Central Administration shall keep vendors informed of the policy to discourage acceptance of orders without a purchase order.
 - c. User agents will submit a requisition to the Building or other appropriate Administrator for desired purchase.
 - d. The Assistant Superintendent, Building Administrators, or Supervisors (supervising Administrators) must approve or take other appropriate action on all purchase orders.
 - e. The only exception to the above is when a user agent is in an emergency situation.
2. The origination of a purchase order is as follows:
 - a. An employee within the user agency/department/building submits a single page requisition to their supervising Administrator.
 - b. The supervising Administrator will approve or disapprove requisition. All requisitions must contain the following information:

- 1) Supplier (correct regional area) and complete address including zip code.
 - 2) School or Department.
 - 3) Complete descriptions of items.
 - 4) Must include an actual or estimated amount.
- c. If approved, the supervising Administrator's office will create a purchase order in the fiscal management software program.
- d. The supervising Administrator will give final approval to the requisition and finalize the requisition into a purchase order by applying a purchase order number. Purchase orders without appropriate numbers are not valid.
- e. If the purchase is to be on a trial basis, the originator will so indicate on the requisition/purchase order form. If a decision is made to keep the items, the originator will send written notification of intent to purchase to the supervising Administrator within the specified trial period.
3. The Business Office will check purchase orders for proper classification of coding. Improper coding will be sent back to the user agent for proper coding or the Business Office will reclassify.
4. All purchase orders will indicate the appropriate address for delivery. On purchase orders for subscriptions, the specific period that the subscriptions are to cover and the delivery address shall be indicated in the "Description" portion of the purchase order.
5. All items that are being returned to a vendor must be sent back following the appropriate return arrangements and the Business Office will be informed of the returned items. This entire procedure cannot exceed the specified trial period or the items purchased on a trial basis will be invoiced for purchase.
6. Because of the year-end reconciliation of encumbrances and the processing of purchase orders for the subsequent year in June, all requisition/purchase orders for the current fiscal year should be submitted by May 1. Requisitions will be accepted after May 1 in an emergency only. Any outstanding purchase orders at the end of June 30th will be taken off the encumbrances and reencumbered in the subsequent fiscal year, thus becoming an expenditure of the next year.
7. Rejection of Bids
The Board and its designees reserve the right to reject any and all bids and to ask for new bids.

8. Responsible Contractor Guidelines.

The Board and its designees may, but are not required to, request information from bidders and consider the following checklist or a portion thereof to assist in determining whether a contractor is a responsible contractor.

The District may:

- Review the ownership and financial stability of the contractor
- Consider the contractor's years of service as in the applicable field.
- Review the list of public school projects completed to determine contractor's track record of delivering a quality project on budget and on time.
- Check references, not only for successful completion of the projects from the owners' perspective, but also from trade contractors' perspectives to determine reputation for jobsite management and pay practices
- If relevant, determine the source of the contractor's workforce and the employee training programs. Any work to be sub-contracted shall be clearly identified, and the subcontractors and their detailed qualifications shall be clearly specified.
- Determine the contractor's ability to respond to service calls (if applicable) and follow-up for warranty work or other service after the work is completed
- Review the contractor's overall safety record, including, but not limited to, its MIOSHA violations history, workers' compensation insurance experience modification rate (EMR) rating, written safety policy (if any) and safety training program
- Review the history of labor problems on prior public school projects with focus on direct hire labor as well as with trade contractors
- Review the list of design professionals the firm has worked with on public school projects
- Review the record on handling document errors and omissions and other design deficiencies discovered during the construction process. i.e., determine how the contractor would successfully build a school project if drawings were not complete or in error
- Determine the level of jobsite supervision the contractor plans to commit to the project and the personnel experience of the committed supervisor(s).
- Review the contractors method of providing jobsite coordination and scheduling trade contractors
- Determine the frequency of construction progress meetings
- Determine the job close out procedure and punch list track record
- Review the quality assurance program
- Review the contractor's litigation and arbitration claims history
- Past service to the district

9. Contractor may be required to provide the following:
- Provide the required performance bond
 - Maintain the minimum insurance requirements
 - Pay prevailing wages where required
 - Perform all work requiring a licensed professional by a properly licensed worker
 - Cooperate with all regulatory agencies
 - Otherwise abide by all applicable federal, state and local laws and regulations
 - Familial relationship disclosure

Questions

Any questions regarding this purchase policy should be directed to the Business Office.