

THE SCHOOL DISTRICT OF TORRINGTON,  
CONNECTICUT

3000

**Business and Non-Instructional Operations**

**Awarding of Contracts**

All contracts between the district and outside agencies shall conform to prescribed standards as required by law.

All contracts between the district and outside agencies shall be prepared under the supervision of the Superintendent or designee, and where appropriate, subject to approval of the legal adviser to the district without prior approval of the Torrington Board of Education under the following conditions:

- A. The work covered by the contract must be an item in an approved annual budget.
- B. The contract is awarded per the specifications of the request for proposals (RFP).
- C. Any contract whose grand total exceeds \$100,000 for the lifetime of the contract will require the contract to be presented to the Board of Education for approval.
- D. Awarded contracts not subject to Torrington Board of Education approval will be reported in the Superintendent's Report at the next Board of Education meeting.
- E. IEP and 504 plans do not require Torrington Board of Education approval.

**Affirmative Action**

The school district shall not enter into any contract with a person, agency, or organization if it has knowledge that such person, agency or organization discriminates on the basis of race, color, religious creed, age, marital status, national origin, sex, sexual orientation, or physical handicap or disability, either in employment practices or in the provision of benefits or services to students or employees.

Legal Reference: Title VII, Civil Rights Act, 42 U.S.C. 2000e et seq. as amended by Title IX, Equal Employment Opportunity Act; Title IX of the Education Amendments of 1972; 42 U.S.C. 1134n et seq. (Higher Education Act)

Connecticut General Statutes Regulation

**Business and Non-Instructional Operations****Relations with Vendors**

The school district shall not extend favoritism to any vendors. Each order shall be placed on the basis of quality, price and delivery with past service being a factor if all other considerations are equal.

**Conflicts of Interest and Endorsements**

The district will not purchase supplies or materials from a staff member of the school district, nor from a member of the household of the staff member unless the purchase follows the formal purchasing procedures.

Employees of the district will not endorse products or services in such a manner that will identify him/her as an employee of the district.

**Affirmative Action**

The school district shall not enter into any contract with a person, agency, or organization if it has knowledge that such person, agency or organization discriminates on the basis of race, color, religious creed, age, marital status, national origin, sex, sexual orientation, or physical handicap or disability, either in employment practices or in the provision of benefits or services to students or employees.

**Legal Reference:**

Connecticut General Statutes 46a-58 through 46a-81 re discriminatory practices

Title VII, Civil Rights Act, 42 U.S.C. 2000e et seq. as amended by Title IX, Equal Employment Opportunity Act

Title IX of the Education Amendments of 1972; 42 U.S.C. 1134n et seq. (Higher Education Act)

## **Business and Non-Instructional Operations Purchasing**

### **Procedures**

#### **Procedures for Entering into a Lease/Purchase Agreement**

These regulations are provided to ensure proper authorization and recording of Lease/Purchase obligations of the Torrington Public Schools.

#### **Definition:**

A Lease/Purchase Agreement is a commitment to acquire equipment or materials where payments will be made from more than one fiscal year, and where the Torrington Board of Education has the option to take permanent title to the equipment or materials at the end of the lease for a nominal or zero payment.

1. Lease/Purchase Agreements will be coordinated by the Director of Business Services.
2. Lease/Purchase Agreements will be executed by the Superintendent or his/her designee.
3. All Lease/Purchase Agreements will contain a non-appropriation clause permitting early termination of the agreement if sufficient funds are not appropriated.
4. All Lease/Purchase Agreements will be approved by the Torrington Board of Education.

## **Business and Non-Instructional Operations**

### **Requesting Goods and Services (Requisitions)**

The Superintendent or designee shall receive and process requisitions in a manner most beneficial to the overall purposes of Torrington Public Schools.

Requisitions for budgeted items shall originate from the personnel directly responsible for their use. The Superintendent or designee shall arrange appropriate administrative review channels in which all requisitions will be examined and approved prior to purchase.

### **Purchasing Procedures**

The procurement function is one of the major business responsibilities of the Torrington Board of Education. The duties of purchasing for the Torrington Board of Education shall be centralized under the Director of Business Services.

The Director of Business Services or designee shall supervise all purchase transactions.

The Director of Business Services shall be familiar with and perform all purchasing activities within the limitations prescribed by law, legal opinions, and in accordance with Torrington Board of Education policies.

Every transaction involving the purchase of property or services shall be by purchase order.

Purchase orders and other purchase obligations shall be signed by the Director of Business Services or designee prior to purchasing.

Employees of Torrington Public Schools are not authorized to make purchases without prior approval.

Specifications governing materials are a joint responsibility of the educational, building services, and business departments.

## **Business and Non-Instructional Operations**

### **Soliciting Prices (Bids and Quotations) Estimated**

#### **Price Under \$10,000**

##### **1. Purpose**

To provide policy concerning the solicitation of competitive quotations.

##### **2. Scope**

This policy applies to transactions on materials and/or services with an estimated unit price of under \$10,000.00 and not covered by a contractual agreement

For material and/or services with an estimated unit price of \$10,000.00 or over and/or covered by a contractual agreement, see Policy 3010.2.

##### **3. General**

All staff requesting goods or services are responsible for obtaining quotations on material and/or services that are expected to exceed \$500.00. This shall be done for both estimating purposes and purchases. A price check will be made on expenditures less than \$500.00 when buying unfamiliar materials.

###### **A. Types of Quotations**

**1. Verbal.** Verbal quotations can be obtained for orders below \$500. A written quote must be obtained prior to submission of a purchase order for approval.

**2. Written.** Written requests for quotation will be sent to vendors under the following conditions:

- a. All capital equipment purchases.
- b. Non-standard conditions, requirements, instructions, etc.
- c. Any occasion where more permanent documentation is advisable. Complete information should be provided including, but not limited to, quantity, description, delivery requirement, special conditions, drawings, specifications, date information required, etc. If replies are to conform to certain format, this should be spelled out. Buyer must be thorough and attempt to remove all known variables.

**B.** Staff should request written requests in an electronic format whenever possible.

**C.** When purchasing materials and/or services requiring written requests for quotation, staff will solicit prices from three or more vendors. A minimum of two suppliers is acceptable providing the District Administration is familiar with the market and prices of the material in question. In the case of proprietary items, more than one price is often not possible, and should be noted on the requisition.

D. When obtaining quotations, staff should keep in mind other segments of Torrington Public Schools may be able to provide the desired material or services. If there are any questions, contact the Director of Business Services or designee.

E. Quotations will be solicited only from vendors whom the Torrington School District knows are qualified or can be qualified to meet all requirements. Maintenance of an approved vendor list is advisable, but not mandatory. Examination of the financial condition of a company, its ability to perform, and facilities should be part of the criteria for an acceptable vendor.

F. Answers to technical questions arising during the quotation period should be provided by the requisitioner. Staff soliciting quotes should ensure all potential suppliers are provided the same information.

G. After all quotations have been received and examined, a summary sheet should be prepared, noting all the pertinent data and discrepancies. Determination of the low bidder and award will be made after all aspects of the requisitioner have been considered under the supervision of the Director of Business Services.

The information gathered will be kept with the purchase order as backup documentation.

H. This policy does not supersede the Torrington Board of Education By-Laws and Code of Ethics or the Torrington Public School Employee Conflict of Interest Policy.

I. Issues of interpretation should be referred to the Director of Business Services who will seek clarification from the Torrington Board of Education, when necessary.

**Business and Non-Instructional Operations****Soliciting Prices (Bids and Quotations)****Estimated Price Over \$10,000****1. Purpose**

To provide policy concerning the solicitation of competitive bids.

**2. Scope**

This policy applies to transactions on material and/or services within estimated unit price of \$10,000.00 or over and/or covered by a contractual agreement

For material and/or services with an estimated unit price under \$10,000.00 and not covered by a contractual agreement, see Policy 3010.1.

**3. Responsibilities**

a. The Director of Business Services has the responsibility for maintaining a uniform set of procedures and forms to serve the bid process. Consideration should include the need for mechanisms for vendor notification, bid analysis and summary, bid bonds, bidder mailing list applications, competitive invitations, instructions to bidders, policy statement of bid award, power-of-attorney forms and sealed bid envelopes.

b. The District is responsible for obtaining bids on all material and/or services covered under this policy for both estimating purposes and purchases.

**4. Award Policy**

The following factors in combination, not necessarily listed in their order of importance, will be considered in reviewing bids and awarding contracts:

1. Prices
2. Bidder's previous record of performance and service. Ability of bidder to render satisfactory service in this instance
3. Availability of bidder's representative to call upon and consult with our using departments
4. Quality and conformance to specifications

The school Board reserves the right to reject any and all bids, waive informalities and to contract as the best interests of the school district may require.

- A. The District will not reveal to a vendor at any time the prices quoted or paid prior to receipt of all bids.

- B. It is a good practice to notify unsuccessful vendors that the bid has been closed and awarded. It is not necessary to note the name of the successful bidder.
- C. This policy does not supersede the Torrington Board of Education By-Laws and Code of Ethics or the Torrington Public School Employee Conflict of Interest Policy.
- D. Issues of interpretation should be referred to the Director of Business Services who will seek clarification from the Torrington Board of Education, when necessary.

## 5. General

A. Bid requests should be typed using a standard form whenever possible. Complete information should be provided including, but not limited to, quantity, description, delivery requirement, special conditions, drawings, specifications, date information required, etc. If replies are to conform to certain format, this should be spelled out. The Torrington School District must be thorough and attempt to remove all known variables.

B. A minimum of three suppliers is acceptable, providing the District Administration is familiar with the market and the prices of the material in question. In case of proprietary items, more than one price is often not possible and should be so noted on the requisition.

C. When obtaining bids, staff should keep in mind other segments of Torrington Public Schools may be able to provide the desired material or services. If there are any questions, contact the Director of Business Services.

D. Bids will be solicited only from vendors whom the Torrington School District knows are qualified or can be qualified to meet all requirements. Maintenance of an approved vendor list is advisable, but not mandatory. Examination of the financial condition of a company, its ability to perform, and its facilities should be part of the criteria for an acceptable vendor.

E. Answers to technical questions arising during the bidding process should be provided by the requisitioner. The Director of Business Services must coordinate the reply and ensure all potential suppliers are provided the same information.

F. After all bids have been received and examined, a summary sheet is to be prepared noting all the pertinent data and discrepancies. Determination of the low bidder and award will be made after all aspects of the requisitioner have been considered under the supervision of the Director of Business Services.

The information gathered will be kept as backup documentation. In cases of bids for estimating purposes, a copy of each bid response is to be sent to the requisitioner along with the bid summary sheet.



**Business and Non-Instructional Operations**

**Paying for Goods and Services**

The Superintendent or designee shall be authorized to approve payment of the current obligations of the Torrington School District.

A monthly financial report will be given to the Torrington Board of Education.

Legal Reference:

Connecticut General Statutes 10-248 Payment of school expenses.

