



Washoe County School District

Every Child, By Name And Face, To Graduation

Purchasing / Procurement Procedures Manual

www.washoeschools.net

775.348.0200

425 East Ninth Street

Reno, NV 89512

Non-Discrimination Statement: The Washoe County School District is committed to nondiscrimination on the basis of race, color, national origin or ethnic group identification, marital status, ancestry, sex, sexual orientation, gender identity or expression, genetic information, religion, age, mental or physical disability, military or veteran's status in educational programs or activities, and employment as required by applicable federal and state laws and regulations. No District employee, including, without limitation, administrators, faculty, or other staff members, nor students shall engage in acts of bullying, harassment, or discrimination on the premises of any public school, school-sponsored event, or school bus in the District. Prohibited behaviors include cyber-bullying, sexual harassment, hazing, intimidation and retaliation.

Disclaimer: This manual may contain references to Board Policy, administrative regulations and other documents pertaining to the rules and regulations of the Washoe County School District. The District reserves the right to revise any of these documents. To verify the current version of any of these documents, please check the District's website at www.washoeschools.net/Page/2903.

MISSION STATEMENT

The Purchasing Department of Washoe County School District recognizes and embraces its responsibility to provide the highest level of support with continuous effort for improvement to Washoe County School District schools and departments in accordance with Federal, State and local statutes and regulations.

PURCHASING DEPARMENT

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NOTE: To obtain a copy of the Purchasing Department Organization Chart and/or the Purchasing Order Function Flow Chart, please call 775-850-8025.

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I. Organization and Procedures

A. Authorization for Procurement

The Purchasing Department of the Washoe County School District is authorized by the Board of Trustees to oversee the purchasing of all supplies, equipment and services required by the District.

Purchasing activities are mostly centralized under the immediate supervision of the Purchasing Supervisor and will be conducted in compliance with the State of Nevada Statutes (NRS 332), in accordance with the interpretations of law as specified by authorized legal counsel.

B. Responsibility and Objectives

It is the responsibility of the Purchasing Supervisor to establish standards of quality consistent with the principles of obtaining the best quality, delivery, timeliness, appropriate product(s), price and suppliers.

To achieve this goal, the Purchasing Department has been charged by the Superintendent and the Board of Trustees with the responsibility for the following:

- Secure competitive bids whenever possible to obtain maximum value from the expenditure of District funds.
- Maintain liaison with suppliers who service the District's needs.
- Coordinate the procurement of goods and services for all District requirements.
- Develop sources of supply to ensure that the District has an adequate number of dependable suppliers from which to obtain supplies, equipment and services.

C. Authorized Purchases

In accordance with the authority delegated to the Purchasing Supervisor, all purchases, irrespective of the source of funding, will be governed by the policies outlined in this manual.

D. Monetary Responsibility

Signature levels required for purchase are as follows:

- Buyer I \$00.00 - \$5,000.00
- Buyer II \$00.00 - \$10,000.00
- Purchasing Supervisor \$10,000.01 - \$50,000.00
- Chief Financial Officer \$50,000.01 - \$100,000.00
- Superintendent of Schools \$100,000 +
- Board Approval \$100,000 +

E. Suppliers

Suppliers who transact business with the Washoe County School District will be dealt with equally and in a manner consistent with good business practices, professional ethics and the requirements of the law.

In accordance with District Administrative Regulation 3313, it is the policy of the Purchasing Department to decline personal gifts, gratuities or discounts in connection with the purchasing function. Neither shall any member of the Board of Trustees or any of its employees accept any commission, expense paid trip, or anything of material value from any individual, company or organization supplying or seeking to supply equipment, supplies or services to the District for any purpose except those minor items of nominal value widely distributed by the individual, company, etc. as part of a public relations or advertising program.

F. Requisition Procedures

The Purchasing Department, in cooperation with the Information Technology Department, has prepared and distributed procedures for entering a request for purchase in the computer system.

- Please use these procedures to ensure that your request is entered correctly. If you cannot locate these procedures, call the I.T. Department and request this information.

II. EXPENDITURE OF FUNDS

A. Fund Sources

All funds deposited with the Washoe County School District, regardless of source, are District funds and must be handled in accordance with District procedures. Although

schools, departments and divisions are allocated funds in their budgets for a given period, this allocation is only an authority to requisition, not to purchase.

B. Account Numbers

Each school, division and department is assigned an account number or numbers by the Business Office. All requests for purchase must carry the complete number of the account to be charged.

C. Requisition to Purchase

For proper control, it is recommended that the ordering function reside with one person within a school or department. The person doing the actual receiving of goods and/or services should do receiving in the IFAS System.

All requests for purchase regardless of the source of funding must be processed through the Purchasing Department on the IFAS software system or by using a procurement card.

Complete instructions for entering a Request for Purchase and Warehouse Requisition are available from the Information Technology Department. Training and complete instructions for using a procurement card are available through the Business Office.

D. Invoice Approval

Once an order has been received or the service performed, it is extremely important that the item(s) or service(s) be received on the IFAS System at the site. This authorizes payment of the invoice. This is the only way the Business Office knows that the invoice should be paid. All sites should arrange for alternate approval rights for Purchase Orders so that potential staff absences do not cause significant delays in paying the invoice.

E. Damages, Shortages, Errors In Invoicing

In the event that a supplier has not successfully met the terms and conditions of a purchase order and consequently payment should not be made, notify the Business Office immediately so that proper action can be taken in a timely manner.

In cases of damage or shortage of shipment and/or errors in invoicing, the vendor should be notified as soon as possible, without authorizing payment. Have available the P.O. number, date of order and the extent and nature of damage and/or error.

Federal/State regulations require that a claim be filed within a specific number of days; failure to do so could result in the claim not being allowed.

Under no circumstances should payment be authorized until damage or shortage is corrected.

F. Returns For Credit

Returns for credit are not automatic. If a supplier has shipped items as ordered (specified), they have legally complied with their part of the contract and are under no obligation to accept returns. Freight charges and/or re-stocking fees may be incurred. These charges will be assessed to requisitioning department or school.

Please contact the Purchasing Department for assistance in arranging for returns.

G. Orders Placed in Error

Errors are most commonly made when an order is called in to the supplier, and a hard copy of the order is sent afterward. Confirming orders should only be initiated by Purchasing Department Staff, and the hard copy must be clearly marked "Confirming Order: DO NOT DUPLICATE". Even if appropriately marked, there is no guarantee the order will not be duplicated. Persons placing orders WITHOUT proper documentation from Purchasing (a valid purchase order) may be held personally responsible for payment and/or be subject to disciplinary action.

H. Unauthorized Use of District Purchase Orders or Accounts

It is a violation of law for any individual to use a District purchase order or discount for their personal use. Anyone doing so may be subject to disciplinary action.

III. SUPPLIER SELECTION

A. Supplier Selection

Suppliers are selected for their capability to serve the needs of the District in the most economical and efficient manner possible. Past performance and cooperation are important factors. Suppliers must comply with the Equal Employment Opportunity Act (Executive Order 11246 as amended) since it is the policy of the District to promote the full realization of equal employment opportunity. They must also comply with other laws and directives as they are issued.

The District's Buyers have a high level of expertise with a wide range of products, services, and local and distant businesses. We have available resources to determine supplier performance, which we are happy to share with other District personnel.

The District Purchasing office maintains an extensive library of reference books and catalogs which will be made available to any District personnel requesting assistance.

B. Supply Sources

A suggested supplier should be provided when entering a Purchase Requisition into the system. However, authority for the final selection of the supplier shall be left to the Purchasing Department, which will make its decision in light of the overall needs of the District.

C. Sole Source

A "sole source purchase" is one wherein an item that is needed can only be purchased from a single source, or because of proprietary interests such as copyright or patented material.

The requisitioning school/department will be required to provide documentation to justify why the technical characteristics inherent in the item make it essential to the project that it should be purchased in preference to another brand with similar characteristics but at a lower cost.

D. Demonstrations/Sample Materials

District personnel wishing to see samples or have equipment demonstrated with a value of \$5,000 or more should contact the Purchasing Department for assistance.

Persons contacting sales representatives directly are reminded to advise the prospective supplier that a purchase order will be issued by the Purchasing Department before delivery of an order can be taken.

IV. BIDS AND QUOTATIONS

A. Bidding and Quoting Requirements

Nevada Revised Statutes (NRS 332) requires all public agencies to follow these general guidelines as stated in NRS 332.039:

If the estimated amount required to perform a contract exceeds \$25,000 but is not more than \$50,000, a request for quotation must be submitted to two or more persons or companies capable of performing the contract, if available, pursuant to NRS 332. The governing body or its authorized representative shall maintain a record of all requests for quotations and all quotations received for at least 7 years after the date of execution of contract.

If the estimated amount required to perform a contract exceeds \$50,000, a formal bid must be solicited pursuant to NRS 332. The governing body or its authorized

representative shall maintain a record of all requests for bids and all bids received for at least 7 years after the date of execution of contract.

In the opinion of most purchasing professionals "aggregate amount" should be interpreted to mean the amount of a commodity or group of similar commodities/services required in one year.

It is the practice of the Washoe County School District Purchasing Department to go to bid on a regular basis for known requirements in order to follow the requirements of the law, to realize the lowest price, and to avoid repetitive quoting and bidding.

B. Late Bids

It is the supplier's responsibility to ensure that their bids are received in the Purchasing Department no later than the appointed hour and date as specified in the Request For Bid (RFB). Late bids will not be considered and will be returned unopened to the bidder.

All bids will be date and time stamped as verification that they were (or were not) received prior to the requested date and time.

C. Confidentiality of Quotations and Bids

Price quotations and bids are given to the District in confidence and shall not be revealed to any other supplier or unauthorized person before the recommendation for award is posted. At that time, prices and terms become part of the public record and are available to any person or business requesting such information.

D. Service Contracts

Certain prices of equipment are covered by service contracts during the warranty period. Forms required by the company providing the service must be signed on behalf of the District only by those authorized to do so: the Superintendent, Assistant Superintendent, Chief Financial Officer, Director of Plant Facilities, Purchasing Supervisor, or their designee(s).

E. Determining Lowest Responsible Bidder

All valid responsible bids shall be considered in determining which is lowest. Purchasing staff will take into consideration delivery terms and conditions, discounts and conformity with specifications. If the lowest bidder is unknown or his/her responsibility is in question, the Purchasing Supervisor may require proof of responsibility.

F. Rejection of Bids

The District may reject any and all bids and/or waive any informality in any bid. In all instances, the decision rendered by the Board of Trustees shall be final.

G. Evaluation of Bids

The Purchasing Supervisor or a District employee designated by the Supervisor as having the proper expertise regarding the commodity being recommended for purchase, will evaluate all bids issued by the Purchasing Department.

H. Attendance At Bid Openings

Bid openings are public and may be attended by anyone, including those who may not have a direct interest in the bid.

I. Bonds

The Purchasing Supervisor has the authority to require bonds as part of the bidding process. The amount shall be set at an amount which is considered necessary to protect the best interests of the District. If such bonding is required, the form and amount of the bond(s) shall be described in the notice inviting bids.

J. Protesting the Award of Bids

Any unsuccessful bidder may appeal a pending bid award prior to award by the Board of Trustees.

Appellant shall submit a written appeal to the Purchasing Supervisor not later than six (6) calendar days after recommendation for award is posted.

K. Emergencies

The Superintendent or the Board of Trustees may decide that an emergency exists affecting the public health, safety or welfare. In that case, under the terms of NRS 332.112, a contract(s) may be let to contend with such an emergency without complying with the requirements of NRS 332.039 and 332.045.

If the Superintendent takes such emergency action s/he shall report it to the Board of Trustees at their next regularly scheduled meeting.

L. Exemptions to Requirements For Competitive Bidding

Nevada Revised Statute 332.115 makes allowance for several exceptions other than emergencies. Some of them are:

- Contract not adapted to competitive bid: sole source, professional services, insurance, software, books, hardware and peripherals.
- Contracts with carriers for persons or property
- Auction, closeout or bankruptcy sales. Failure to receive responsible bids

Nevada Revised Statutes allow the bidding of any commodity or service when it is in the best interests of the District.

M. Approval Requirement for Exemptions to Requirement for Competitive Bidding

Expenditures over \$100,000 are to be approved by the Board of Trustees and the Superintendent. An RFP is recommended unless due diligence has been performed or sole source has been established. An RFP is recommended, but not required.

For expenditures over \$50,000 but less than \$100,000, an RFP is recommended but not required. Due diligence or sole source establishment is required. CFO approval is required for such expenditures.

V. LEGISLATIVE, GOVERNMENTAL & PROFESSIONAL ACTIVITIES

A. Commission to Study Governmental Purchasing

Nevada Revised Statute 332.215 requires purchasing officers in counties whose population exceeds 100,000 to be participants in a local commission to study governmental purchasing.

The Commission is to meet at least quarterly, and study practices in governmental purchasing and laws relating thereto and make recommendations with respect to those laws to the next regular session of the legislature.

Washoe County School District has actively participated in the Commission since its inception.

The Commission monitors legislative activities while the Legislature is in session, lobbies on issues pertaining to public purchasing, provides professional testimony at hearings, and makes recommendations to legislators regarding changes in Nevada Revised Statutes.

B. Northern Nevada Consortium for Cooperative Purchasing

Washoe County School District Purchasing Department personnel were instrumental in establishing the Northern Nevada Consortium for Cooperative Purchasing (NNCCP) in 1983. The main purpose, as indicated in the organization's title, is to pool our needs in as many ways as possible to increase our buying power.

Meetings are held monthly and several joinder bids are negotiated each year, in which any agency that wishes may take part.

The activity of the Consortium includes acting as the Commission to Study Governmental Purchasing by monitoring and testifying at legislative hearings, and suggesting language for statutory changes, as described in paragraph V.A.

The NNCCP also provides educational opportunities to its members and other interested purchasing professionals. Classes and study groups are organized on an irregular basis, depending on the needs and interests of its members. Members are encouraged to attend classes, workshops, vendor shows and seminars at local institutions of learning as well as those sponsored by other professional purchasing groups such as the Institute of Supply Management (ISM), N.A.P.S.M.- Capitol Area, The National Purchasing Institute (NPI), California Association of Public Purchasing Officers (CAPPO), and California Association of School Business Officials (CASBO).

VI. WAREHOUSE

A. Warehouse

The Purchasing Department has been assigned to stock the District's warehouse with furniture, equipment and supplies commonly used by all sites. The purpose of the warehouse is to allow for volume purchases of commonly and frequently used items, to take advantage of improved pricing and to have materials on hand when needed.

B. Addition/Deletion of Stocked Items

Adjustments are needed from time to time in the items maintained in stock. Deletions are determined by producing a "no-activity" report (no draw or purchase for a given period) and individual attention to each item listed. The decision to reduce stock, delete or maintain it at the same level is the sole responsibility of the Purchasing Supervisor.

Additions to stock are considered either at the suggestion of the Purchasing staff or the using schools/departments. Evaluation is made on the basis of commonality, volume of use, packaging size, funds available, space requirements and lead-time.

C. Receiving and Shipping

With the exception of items for warehouse stock, most purchases are shipped directly to schools/departments. When received, merchandise should be checked for discrepancies and/or damage before receiving in the District's IFAS System. Packing slips should be filed with site documentation.

Completing paperwork promptly will ensure against misplacement and satisfy suppliers' expectations of timely payment.

Warehouse staff handles outgoing shipments carried by truck. Check with the warehouse for availability of packing materials.

D. Personal Items Received at District Warehouse

The shipping of personal items to the District warehouse by employees is not acceptable. Delivery will be refused on any such merchandise.

REVISION HISTORY

Date	Revision	Modification
	A	Adopted as CSI Manual PUR-M001
4/30/2009	D	Revised
5/02/2016	1.0	Revised: converted to Administrative Manual 3325