



***Washoe County School District***

Every Child, By Name And Face, To Graduation

# Purchasing Department Manual

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**Non-Discrimination Statement:** The Washoe County School District (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.

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**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 websites [www.washoeschools.net/policy](http://www.washoeschools.net/policy) and [www.wcsdpolicy.net](http://www.wcsdpolicy.net)

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## MISSION STATEMENT

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

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## PURCHASING'S ENVIRONMENTAL PREFERABLE PURCHASING STATEMENT

The Washoe County School District's Purchasing Department embraces the responsibility to environmentally preferable purchasing (EPP). To support the effort of EPP, the Purchasing Department will give preference to environmentally superior products where quality, function and cost are equal or better. In addition, when practical, the Purchasing Department will seek opportunities to increase sustainable and recycled product sourcing.

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## PURCHASING DEPARTMENT

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## I. ORGANIZATION AND PROCEDURES

### A. Authorization for Procurement

The Purchasing Department 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 Director of Procurement and Contracts and will be conducted in compliance with the Nevada Revised Statutes, in accordance with the interpretations of law as specified by authorized legal counsel.

### B. Responsibility and Objectives

It is the responsibility of the Director of Procurement and Contracts to establish standards of quality consistent with the principles of obtaining the best quality, delivery, timeliness, appropriate product(s), price and Vendors.

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 solicitations whenever possible to obtain maximum value from the expenditure of District funds.
- Maintain liaison with vendors 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 Vendors from which to obtain supplies, equipment and services.

### C. Authorized Purchases

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

## D. Monetary Responsibility

Signature thresholds and approvals required for Purchase Orders are as follows:

- Buyer I \$0.00 to \$5,000.00
- Buyer II \$0.00 to \$9,999.99
- Director of Procurement and Contracts \$10,000.00 to \$49,999.99
- Chief Financial Officer \$50,000.00 to \$99,999.99
- Superintendent \$100,000 +
- Board of Trustees (approval only) \$100,000 +

## E. Vendors, Suppliers, Contractors

Vendors, suppliers, and contractors who transact business with the 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 (Purchasing Department), vendors who transact business with the Washoe County School District will be dealt with equally and in a manner that ensures conformance with good business practices, professional ethics, and the requirements of law. All prospective bidders shall be given identical information. The specifications, terms and conditions of all solicitations will be prepared in a language familiar to the trade and in a manner that will encourage competitive bidding.

No member of the Board or any of its employees shall accept any commission, expense paid recreational trip, or anything of material value from any individual, company, partnership, corporation, or any organization supplying or seeking to supply equipment, supplies or services to the district for any purpose except those minor items of nominal value (no more than \$10.00) that are widely distributed by the individual, company, etc., as part of a public relations or advertising program.

## II. EXPENDITURE OF FUNDS

### A. Fund Sources

All funds deposited with the 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 specific 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 Office of Business and Financial Services. All requests for purchase must carry the complete number of the account to be charged.

## C. Purchase Requisitions

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 are to receive on said items using the BusinessPlus system.

Purchase Requisitions, regardless of funding source, are to be processed through the BusinessPlus system or by using a procurement card (PCard).

Training for entering a Purchase Requisition and use of a PCard is managed by the Office of Business and Financial Services.

## 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 through BusinessPlus. This authorizes payment of the invoice. This is the only way the Accounts Payable Department 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 vendor has not successfully met the terms and conditions of a Purchase Order and consequently payment should not be made, notify the Office of Business and Financial Services 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 Purchase Order number, date of order and the extent and nature of damage and/or error.

Federal and 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 vendor has shipped items as ordered, the vendor has legally complied with his/her part of the contract and are under no obligation to accept returns, unless specified within the terms and conditions of the purchase or an executed contract. Freight charges and/or re-stocking fees may be incurred. These charges will be assessed to requisitioning school, department or site. Please contact the Purchasing Department for assistance in arranging for returns.

## G. Orders Placed in Error

Errors are most commonly made when an order placed with or called in to the vendor, and a hard copy of the order is sent afterward. These confirming orders are not permitted, as a fully approved and executed PO or PCard transaction are the only approved methods for making a purchase.

Persons placing orders without 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 his/her personal use. Anyone doing so may be subject to disciplinary action.

# III. VENDOR SELECTION

## A. Vendor Selection

Vendors 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. Vendors 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 Purchasing Department Buyers have a high level of expertise with a wide range of products, services, and businesses. The department uses available resources to determine vendor performance, which are shared with other District personnel.

## B. Suggested Vendors

A suggested vendor should be provided when entering a Purchase Requisition into the system. However, authority for the final selection of the vendor shall be left to the Purchasing Department

Any persons contacting sales representatives directly are reminded to advise the prospective vendor that a Purchase Order will be issued by the Purchasing Department before delivery of an order can be taken.

## C. Single/Sole Source

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

The requisitioning school, department or site 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. This documentation must be approved by the Department's Chief Officer and the Purchasing Department prior to using the vendor.

## D. Demonstrations/Sample Materials

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

# IV. BIDS AND QUOTATIONS

## A. Bidding and Quoting Requirements

Competition from properly informed and responsible firms and individuals ensures value received for tax dollars. Therefore, competitive bidding by advertised invitation, requests for written quotations and negotiation shall be instituted in a manner that will provide for financially sound practices in the expenditure of school district funds.

All formal Bids and Quotations and other related solicitations are processed as outlined and governed by the requirements of NRS Chapter 332, Purchasing: Local Governments, and Chapter 338, Public Works. If the estimated amount required to perform a contract exceeds \$25,000, but is not more than \$50,000, a formal Request for Quote (RFQ) must be submitted to two or more persons or companies capable of performing the contract, if available. The governing body or its authorized representative shall maintain a record of all RFQ submissions received for at least seven (7) years after the date of execution of contract.

If the estimated amount required to perform a contract exceeds \$50,000, a formal Request for Bid (RFB) must be solicited. The governing body or its authorized representative shall maintain a record of all RFB submissions received for at least seven (7) years after the date of execution of contract.

All solicitations meeting the requirements of NRS Chapters 332 and 338 and other purchases and contracts with a combined value of \$100,000 or more require the approval of the Board of Trustees prior to the execution of a Purchase Order or contract.

## B. Late Bids

It is the vendor's responsibility to ensure that the company's bids are received in the Purchasing Department no later than the appointed hour and date as specified in the 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 the submission was (or was not) received prior to the requested date and time.

## C. Confidentiality of Submitted Quotations and Bids

All solicitation responses submitted to the District are handled in confidence and guidelines governed by NRS 332 and NRS 338 (Public Works) are strictly adhered to by all Purchasing staff.

## D. 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 Director of Procurement and Contracts may require proof of responsibility.

## E. Rejection of Submission

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

## F. Evaluation of Solicitations

The Director of Procurement and Contracts or a Purchasing Department staff designated by the Director as having the proper expertise regarding the commodity being recommended for purchase, will evaluate all solicitations issued by the Purchasing Department.

## G. Attendance at Solicitation Openings

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

## H. Bonds

The Director of Procurement and Contracts 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 solicitations.

## I. Protesting the Award of Solicitations

Any unsuccessful bidder may appeal a pending bid or Request for Proposal (RFP) Recommendation of Award prior to approval by the Chief Financial Officer or Board of Trustees.

Appellant shall submit a written appeal to the Director of Procurement and Contracts not later than six (6) calendar days after the date of a formal Letter of Intent or Recommendation of Award is issued.

## J. Emergencies

The Superintendent or the Board of Trustees or designee 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 or designee takes such emergency action, it shall report it to the Board of Trustees at the next regularly scheduled Board meeting.

## K. Exemptions to Requirements for Competitive Bidding

NRS 332.115 makes allowance for several exemptions from the competitive bidding process other than emergencies. Contracts which by their nature are not adapted to award by competitive bidding, include:

- A. Items which may only be contracted from a sole source;
- B. Professional services;
- C. Additions to and repairs and maintenance of equipment which may be more efficiently added to, repaired or maintained by a certain person;

- D. Equipment which, by reason of the training of the personnel or of an inventory of replacement parts maintained by the local government is compatible with existing equipment;
- E. Perishable goods;
- F. Insurance;
- G. Hardware and associated peripheral equipment and devices for computers;
- H. Software for computers; and
- I. Books, library materials and subscriptions.

Although an item or commodity may be exempt from the competitive bidding process under NRS 332.115, the Purchasing Department may issue a bid or other solicitation if deemed to be in the best interest of the District and the use of District funds.

#### L. Approval Requirement for Exemptions to Requirement for Competitive Bidding

Expenditures over \$100,000 require approval by the Board of Trustees. The issuance of an RFP is recommended, although not required, for a commodity/service defined as exempt under NRS unless another form of due diligence has been performed or sole source has been established.

For expenditures over \$50,000, but less than \$100,000, an RFP is recommended, but not required for a commodity/service defined as "exempt" under NRS. Due diligence or sole source establishment is required. Approval by the Chief Financial Officer 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.

The 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 NRS.

## B. Northern Nevada Consortium for Cooperative Purchasing

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 cooperative RFBs are solicited each year, in which any agency that wishes may take part.

The NNCCP also provides educational opportunities to its members and other interested purchasing professionals. Classes and study groups are organized on as-needed 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 oversee and 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 when there is low activity or no activity of a certain item over a period of time. The decision to reduce stock, delete or maintain it at the same level is the sole responsibility of the Director of Procurement and Contracts.

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

### C. Receiving and Shipping

Except items for Warehouse stock, most purchases are shipped directly to schools, departments and sites. When received, merchandise should be checked for discrepancies and/or damage before receiving in the BusinessPlus system. Packing slips should be filed with site documentation.

Completing paperwork promptly will protect against misplacement and satisfy vendors' 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
3/02/2020	2.0	Revised