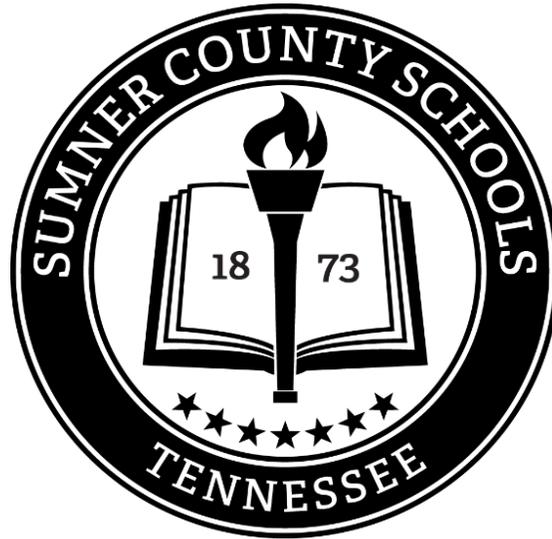


PURCHASING PROCEDURE MANUAL



Board Policy Cross Reference	2.805 – Purchasing 2.807 – Requisitions 2.808 – Purchase Orders and Contract 2.809 – Vendor Relations 5.601 – Staff Conflict of Interest 5.605 – Staff Gifts and Solicitations
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TABLE OF CONTENTS		
	Description	Page
I.	Purpose	3
II.	Overview	3
	<ul style="list-style-type: none"> A. Scope B. Responsibility 	
III.	Purchasing Process	3 - 6
	<ul style="list-style-type: none"> A. Purchases \$0 - \$4,999.99 B. Purchases \$5,000 - \$49,999.99 C. Purchases \$50,000 and Above D. Award E. Technology Purchases F. Cooperative Purchasing Agreements 	
IV.	Purchase Order	7
	<ul style="list-style-type: none"> A. Exemption from Purchase Order B. Purchase Order Change Order 	
V.	Vendors	8

I. PURPOSE

The purpose of this manual is to establish and document uniform procedures for the procurement of goods and services that is consistent with the policies of the Sumner County Board of Education and laws governing the State of Tennessee.

II. OVERVIEW

A. SCOPE

This manual and all the procedures outlined herein shall apply to every expenditure of Sumner County Board of Education funds, regardless of their source, except for School Funds. Nothing in the manual shall prevent the Sumner County Board of Education from complying with the terms and conditions of any grant, gift, or cooperative agreement.

B. RESPONSIBILITY

1. It is the individual responsibility of each employee involved in the procurement process to adhere to the policies upon which these procedures are based.
2. It is the responsibility of each person to bring questions or concerns relative to these procedures to the attention of the Purchasing Supervisor.
3. Revisions to the Purchasing Procedure Manual will be the responsibility of the Chief Financial Officer and/or the Purchasing Supervisor.

III. PURCHASING PROCESS

The Purchasing Process shall serve as a guideline for competitive quotations. The Purchasing Supervisor shall review purchases for conformity with the established guidelines. The process is applicable on a line-item basis per procurement request.

It is a violation of Board policy to split or separate into smaller orders any purchase of a good or service to evade the competitive procurement requirements or to avoid obtaining the required approval.

A Quote should contain at a minimum:

1. Name and address of the vendor
2. Date of the quotation
3. Fixed dollar value for the good or service
4. Expiration date (if applicable)
5. Description of the good(s) or service(s)

A. Purchases \$0 - \$4,999.99

- No quotes are required.

B. Purchases \$5,000 - \$49,999.99

- A minimum of three (3) quotes are required.
- Exceptions to three (3) quote requirement:
 - The good or service is provided by a limited number of vendors.
 - Multiple quotes were requested, and a limited number of vendors responded by the quote deadline.

C. Purchases \$50,000 & Above

- The Purchasing Supervisor is responsible for conducting the bid process.
- The requesting department is responsible for providing a detailed specification to the Purchasing Supervisor.
 - Criteria any specification must have:
 1. Simple, clear, and concise.
 2. Thorough enough to eliminate the bidding of a good or service that is not consistent with the quality requested.
 3. Fair to all vendors to create an atmosphere of open competition.
- Depending on the type of good or service requested, the length of time to complete the bid process may vary. The chart below represents a sample timeline to complete the process:

Specifications submitted to the Purchasing Supervisor	Minimum of 1 week prior to the release of solicitation documents.
Open Solicitation Period	Minimum of 10 calendar days unless it is demonstrated that a shorter period is necessary.
Bid Review Period	Allow a minimum of 10 business days after the date of bid opening.
Submission to Board for Final Approval	Varies depending on the solicitation due date. Recommendation letters are due seven (7) calendar days prior to the Board meeting date.

D. Award of Competitive Bids

The Requestor shall evaluate and recommend an award to the vendor with the lowest responsive and responsible submission.

There are situations where it is in the best interest of the Sumner County Board of Education to award a bid to a vendor other than the vendor with the lowest cost proposal. In such an event, the Purchasing Supervisor and the Requestor shall document the reasons for awarding a bid to a vendor other than one with the lowest cost proposal.

A recommendation letter/memo must be drafted by the Requestor and submitted to the Purchasing Supervisor for inclusion on the monthly meeting agenda of the Sumner County Board of Education seven (7) days prior to the meeting date. The recommendation letter/memo should include the following:

- Identify the Department/School submitting the recommendation
- Source of Funds
- Identify the recommended vendor
- Description of the Good/Service and Pricing information

E. Technology Purchases

The Information Technology Department (IT) has standardized on the purchase of technology hardware for the Sumner County Board of Education. Any hardware not approved by IT will not be supported nor allowed on the network.

All purchases of technology hardware are processed through the Technology Supply Chain Manager, regardless of the funding source. Hardware includes the following: desktop, laptop, Apple product line, interactive projector, and such like. Excluded from this requirement are items classified as an accessory product: keyboard, mouse, case, mount, and such like.

F. Cooperative Purchasing Agreements

The Sumner County Board of Education has authorized the use of the following National Cooperative Purchasing Organizations:

- January 23, 2018
 1. National Joint Powers Alliance (*NJPA*)
 2. National Intergovernmental Purchasing Alliance (*National IPA*)
 - The Cooperative Purchasing Network (*TCPN*) merged with National IPA. All TCPN contracts fall under the authority of National IPA.
 3. U.S. Communities

*National Joint Powers Alliance has changed its' name to Sourcewell.

**National IPA and U.S. Communities have merged to form Omnia Partners.

- April 17, 2018
 1. Buy Board
 2. Choice Partners Cooperative
- November 27, 2018
 1. National Cooperative Purchasing Alliance (*NCPA*)
- August 19, 2019
 1. The Interlocal Purchasing System (*TIPS*)
- February 21, 2023
 1. Equalis Group

IV. PURCHASE ORDER

A Purchase Order is required for all purchases of \$1,000 and above unless an exemption applies. A Purchase Order is required prior to the order being placed. The Requestor is responsible for verifying that appropriate funds are available prior to requesting the purchase order. To initiate the process, a Requisition must be entered into Tyler for approval.

A. Exemption(s) from Purchase Order

The following list of goods or services will not require a Purchase Order; however, the Department Head may request a purchase order for any of these exemptions. The list is not comprehensive and other situations may be exempt from the Purchase Order requirement on a case-by-case basis. All exemptions, not listed below, shall require approval from the Chief Financial Officer or Purchasing Supervisor.

Bank fees and service charges	Medical bills
Consultant and Audit fees	Membership fees / Dues
Drug Testing	Newspaper Advertisement
Fuel	Postage/Shipping Costs, if not part of an order
Insurance payments	Professional Services fees
Internet Access fees	Travel reimbursements & hotel bills
Legal services & court costs	Utilities
Licenses, Software & Permits	Equipment repairs
Magazine / Publication subscriptions	Workshop / Conference registration

B. Purchase Order Change Order

A Purchase Order may require the need for adjustment due to errors. A Purchase Order can be adjusted for the following reasons:

1. Incorrect information such as Item Description, Budget Code, Vendor, Delivery Location, etc.

V. Vendors

Sumner County Board of Education employees are prohibited from accepting things of material value from individuals, companies or organizations doing business with the school system. Exceptions to this policy are the acceptance of minor items which are generally distributed to all by the companies through public relations programs.

No person officially connected with or employed by the Sumner County Board of Education will be an agent for or have any financial compensation or reward of any kind from any vendor for the sale of supplies, materials, equipment, or service.

To comply with Internal Revenue Service requirements, all vendors are required to have a current IRS Form W9 on file with the Sumner County Board of Education.

To comply with the Tennessee Lawful Employment Act, non-employees, individuals hired as independent contractors, must have on file any one of the of the following documents:

- A valid Tennessee driver license or photo identification license used by the department of safety;
- A valid driver license or photo identification issued by another state where the issuance requirements are at least as strict as those in this state, as determined by the department. The commissioner, in consultation with the department of safety, shall determine which states have issuance requirements that are at least as strict as this state, and shall develop, and periodically update, a publicly accessible list of such states on the department's website;
- An official birth certificate issued by a United States state, jurisdiction or territory;
- A United States government-issued certified birth certificate;
- A valid, unexpired United States passport;
- A United States certificate of birth abroad (DS-1350 or FS-545);
- A report of birth abroad of a citizen of the United States (FS-240);
- A certificate of citizenship (N560 or N561);
- A certificate of naturalization (N550, N570 or N578);
- A United States citizen identification care (I-197 or I-179); or
- A valid alien registration documentation or other proof of current immigration registration recognized by the United States Department of Homeland Security that contains the individual's complete legal name and current alien admission number or alien file number (or numbers if the individual has more than one (1) number).