

**Jefferson County Schools**  
**110 Mordington Avenue**  
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**Superintendent:**  
Susan K. Wall

**Board Members:**  
Gary Kable, President  
Scott Sudduth, Vice President  
Mariland Lee  
Alan Sturm  
Larry Togans

## MEMORANDUM

TO: All  
FROM: Beth Marrone, Chief School Business Official  
DATE: August 1, 2016  
RE: Purchasing Policy and Procedures

*In an effort to help facilitate the adherence to purchasing policies, we have compiled this memorandum as a quick “at your fingertips” reference guide.* Attached is a copy of the Jefferson County Schools Purchasing Policies and Procedures Manual (the Policy), which was board approved on November 26, 2012. Each department/school is responsible for procuring purchases in accordance with the Policy. The Finance Department will be monitoring adherence to these policies and will periodically request purchasing procurement documents from selected transactions to test the department/school’s compliance with the Policy. Significant findings of the audit will be reported to the Superintendent and/or Board Members.

**Competitive Bid Threshold Limits** (Section 7)

The threshold level to be used is determined by the total estimated cost of the item being purchased, which is the unit cost multiplied by the quantity (Section 7.3.). **Purchases cannot be separated into a series of separate requisitions or purchase orders, called stringing, for the purpose of circumventing the applicable threshold limits of these competitive bidding procedures.** The following is a summary of threshold limits for purchases:

**Less than \$5,000** (Section 7.11.1):

- Competitive bids are encouraged but not required

**From \$5,000 to \$9,999** (Section 7.11.2.)

- Competitive bids are required
- 3 Verbal quotes must be obtained
- Bids may be solicited by telephone, internet, mail or visiting vendor
- Documentation of all quotes must be maintained, including:
  - Vendor name & contact information.
  - Name of JCS employee seeking the quote.
  - Date, item and price.

**From \$10,000 to \$24,999** (Section 7.11.3.)

- Competitive bids are required.
- 3 Written bids must be obtained. “No Bid” is not considered a received bid.
- Bids may be solicited by telephone, internet, mail or visiting vendor.
- A written bid must be submitted by vendor.
- All bids received must be retained for public review and inspection.

**From \$25,000 to \$49,999** (Section 7.11.4.)

- Competitive bids are required.
- Bids must be solicited from advertising media, or mass mailings.
- A good faith effort must be made to solicit as many competitive bids as practical.
- Invitation for bids must include all specifications and pertinent attachments.
- The requirement to advertise may be waived if the vendor is considered to be the sole source for the item being purchased, or when professional, technical, or specialized services are being acquired under an agreement. All waivers must be well documented and signed by the Superintendent.
- All criteria and evaluations used in making the selection, as well as all bids received, must be retained for public review.

**\$50,000 or more** (Section 7.11.5.)

- Solicitation for bids must specify that bids are to be received as sealed bids.
- Request for bids must be publicly advertised, using media such as legal advertisements in local newspapers.
- Invitation for bids must include all specifications and pertinent attachments.
- All bids will be publicly opened at the time and place specified in the invitation for bids.
- The requirement to advertise may be waived if the vendor is considered to be the sole source for the item being purchased, or when professional, technical, or specialized services are being acquired under an agreement. All waivers must be well documented and signed by the Superintendent.
- All criteria and evaluations used in making the selection, as well as all bids received, must be retained for public review.

**Alternative Procurement Procedures** (Section 8)

Competitive bidding is not required if any of the following conditions exist:

- No bidders respond – where and how bid was advertised must be documented.
- Item is unique, or is not available from any other source (sole source)
- Item is available from State or another LEA
- Item is available from statewide contract.
- Item is available from federal or GSA contract
- Item is available from a sheltered workshop
- Item is a used vehicle or piece equipment and its purchase is determined by the Chief School Business Official to be in the best interest of the LEA

**Exemptions from Competitive Bid Requirements** (Section 9)

The following items or services may be purchased without advertisement of obtaining competitive bids:

- Accounting services and audits of individual schools
- Advertising
- Artwork or Historical items
- Attorneys and Law Firms
- Auditing Contracts between Governmental Agencies
- Entertainers
- Facilities Rentals
- Medical Fees
- Postage
- Software Maintenance
- Student Activities
- Investigative Services
- Subscriptions and Publications
- Training Activities
- Tuition, Stipends, Accreditation and Registration Fees
- Utilities

- Livestock and fish stock for vocational programs

**Construction Projects** (Section 10)

- All change orders that have an impact on the total cost of the project, and change orders that have an impact on the cost or scope of the project must be submitted to the board for approval.

**Agreements (Contracted Services)** (Section 12)

Used for obtaining professional, technical, or other specialized services where the scope of the services is known but the price is not the sole factor in determining the award.

- Must be in writing
- Must be board approved (include approval date)
- Total cost must be stated either as a “sum certain” or at a fixed rate
- Must include the total being paid for any anticipated travel expenses
- Room and travel accommodations are not to be paid directly by the LEA for contract service providers
- Agreement addendum (Form WV-96) must be attached and included as a part of the final contract/agreement. See Appendix C, page 47 & 48 of the Policy

**Approval** (Section 18)

In order to ensure that only necessary purchases are made, all purchases must have prior approval of an employee who has budgetary responsibility over the individual initiating the purchase request.

- Purchases of commodities or services, with the exception of consumable supplies, that involve an expenditure of \$5,000 or more, but less than \$25,000 must have prior approval of the Chief School Business Official (the approval can be verbal).
- Purchases of commodities or services, with the exception of consumable supplies, that involve an expenditure of \$25,000 or more, but less than \$100,000 must have prior approval of the Superintendent (the approval can be verbal).
- Purchases of commodities or services, with the exception of consumable supplies, that involves an expenditure of \$100,000 or more must have prior approval of the LEA Board. The approval needs to be given by a separate motion of the Board (must be included on Board agenda).

The updated purchasing procurement documents are available on the Jefferson County Schools website under /Departments and Services/Finance/Purchasing:

- Jefferson County Schools Purchasing Policies and Procedures Manual
- Vendor Registration and Disclosure Statement
- IRS W-9 Form
- Agreement Addendum (Form WV-96)
- Purchasing Affidavit

For questions regarding the Policy, please contact Peggy A. Smith, Assistant Treasurer at 304-728-9227 or pesmith@access.k12.wv.us.