

## BUDGET IMPLEMENTATION

The Board of Education places the responsibility of administering the budget, once adopted, with the Superintendent. S/he may consult with the Board when major purchases are considered and shall keep the Board informed as to problems or concerns as the budget is being implemented.

The Superintendent shall be authorized to proceed with making financial commitments, purchases, and other expenditures within limits provided in the budgets, limitations stated in Board policies, and within legal authority expressed in State statutes.

Listings of expenditures, appropriate financial reports, and budget comparison reports shall be submitted monthly to the Board to keep members informed as to the status of the budget and overall financial condition of the District.

If, during the fiscal year, it appears to the Superintendent that actual revenues are less than estimated revenues, including the available equity upon which the appropriations from the fund were based, the Superintendent shall present to the Board recommended amendments to the General Appropriations Act that will prevent expenditures from exceeding revenues. Such recommendations shall be in accordance with requirements of the law and provisions of negotiated agreements.

M.C.L.A. 141.436 et seq., 388.1702

## PURCHASES SUBJECT TO BID

### A. Objective

The purchasing objective of the Board of Education shall be to acquire quality materials, supplies, equipment, and services which offer District personnel the most effective and efficient means to perform their tasks. The policy of the Board will be to acquire goods and services at the lowest reasonable cost from responsible contractors who will act in the best interest of the District.

### B. Criteria

In awarding purchases or contracts for services, the following criteria will be considered:

1. price
2. terms of payment
3. quality of the product
4. service, delivery, and maintenance of product
5. suitability of the product
6. conformance to specifications
7. past performance to the District
8. vendor reliability

The opportunity to submit bid proposals to the Evert Public School District shall be afforded to all qualified vendors, contractors, and sub-contractors, and sub-contractors who do not discriminate against any employee or applicant for employment because of race, color, religion, creed, national origin, or ancestry, or also because of age or sex except where based on a bona fide occupational qualification.



C. Bidding and Bid Awards

1. \$10,000.00 or More

Materials, Supplies, and Equipment -- No purchase shall be made of an item or group of items in a single transaction costing \$10,000.00 or more unless competitive bids are obtained for those items as approved by the Board pursuant to Section 1274 of the School Code of 1976, as amended by Act 489, Public Acts of Michigan, 1982 (effective March 30, 1983) and Act 140, Public Acts of 1983 (effective July 18, 1983).

Construction or Repair Projects -- Prior to commencing construction of a new school building, or addition to or repair or renovation of an existing school building, costing \$10,000.00 or more, except repair in emergency situations, the Board shall obtain competitive bids on all the material and labor required to complete the proposed construction, addition, repair, or renovation. Repair work normally performed by District employees is excepted from this bidding requirement. The Board shall advertise for bids, require the filing of security, and open and examine all bids at a public meeting of the Board pursuant to Section 1267 of the School code of 1976, as amended by Act 431, Public Acts of 1982.

2. From \$5,000.00 to \$9,999.00

Whenever possible, single purchase shall be made of an item or group of items in this range unless at least three (3) quotations are obtained.

3. From \$2,000.00 to \$4,999.00

Whenever possible, single purchase shall be made of an item or group of items in this range unless at least three (3) verbal quotations are obtained.

4. Below \$2,000.00

Purchase transactions in this category may be carried out in a manner deemed the most appropriate, consistent with District purchasing guidelines.



5. Exceptions

In the following cases, goods and services shall be obtained in a manner deemed the most appropriate, consistent with District purchasing guidelines.

- a. An emergency circumstance requires the acquisition of goods or services before all conventional steps can be carried out.
- b. A limited number of acceptable potential bidders exists due to rigorous specifications for a particular product or service.
- c. For categories 2 and 3, above, the prescribed procedures may be waived if an equivalent product or service has been purchased in the recent past.

D. Documentation

The Board directs that all purchases from all funds under its control and responsibility be made after proper written documentation is secured to support such purchases, excluding purchases of a minor or emergency nature.

E. Budget

Sufficient unencumbered and unexpended budgeted amounts must be available in appropriate accounts prior to initiation of each purchase.

F. Equal Opportunity

Opportunity shall be provided to all responsible suppliers to do business with the District. To this end, the Superintendent or designee shall develop and maintain lists of potential bidders, including minority and woman-owned enterprises, for the various types of materials, equipment, and supplies. Such bidder lists shall be used in the development of a distribution listing for mailing specifications and invitations to bid. Any supplier may be included in the list upon request.



G. Agency and Endorsement

No Board member or employee of this District shall act as agent for any author, publisher, or vendor of school books, school equipment, or school services from which this District makes any purchase. Further, employees of the District shall not authorize the written use of the District name to endorse products or services unless prior approval is obtained from the Superintendent or designee.

H. Acceptance of Gifts

No Board member or employee of this District shall accept any gratuity, financial or otherwise, from any supplier of goods or services to the District.

I. Personal Involvement

No Board member or employee of this District shall be given special consideration in dealings with the District or be allowed to use the District's credit, discounts, or purchasing system to purchase or obtain equipment, supplies, or services for personal use. In addition, any Board member or employee providing a service or product to the District shall be excluded from decision making for such purchases.

J. Authority

The Superintendent or designee is authorized to obtain quotations and award bids except for certain construction or repair projects as outlined in C above.

M.C.L.A. 380.1267, 380.1274 et seq.

Revised 12/13/04