Washington County School District
121 West Tabernacle Street
Saint George, Utah 84770
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District Policy 6000

Purchasing and Advertising

Business, Accounting, Purchasing Washington County School District (Approved 9-11-01; Revised 9-9-03; Revised 11-11-03; Revised 4-12-05; Revised 8-9-05; Revised 1-10-17; Revised 4-14-20

1. Purpose:

To enhance the education mission of the WCSD by the procurement of all goods and services at the lowest cost consistent with quality, quantity and delivery requirements.

2. Policy:

2.1. All contracts negotiated for the procurement of goods and services are to be in strict compliance with District Policy and Utah State Procurement Code. (State Link)

2.2. Only authorized personnel, who have been given exclusive procurement authority by the board of Education, may engage in any type of negotiations for the procurement or lease of goods and services.

2.3. Only approved District Purchase Order forms and software may be used for the procurement of all goods and services when District budgeted funds are used.

2.4. Advance payments for the procurement of goods and services are hereby prohibited. Exceptions may be determined on an as need basis and approved by the appropriate District personnel.

2.5. Emergency procurement shall be limited to only those supplies, services, or construction items necessary to meet the emergency. "An emergency condition is a situation which creates a threat to public health, welfare, or safety such as may arise by reason of floods, epidemic, riots, equipment failure, or such other reason as may be determined by the Superintendent or designee. The existence of such condition creates an immediate and serious need for supplies, services, or construction that cannot be met through normal procurement methods (UC 63-56-24).

2.6. All soliciting of funds from school children for purposes other than school activities and school projects is prohibited. Exception to this rule may be made by written permission from the

Superintendent.

2.7. All soliciting agents are requested to clear through the School District Office before soliciting or offering for sale any wares, articles, stocks, insurance, etc., on any school premises except at the District Office. This shall not be interpreted to exclude offering sales, wares, etc., however, agents are required to have clearance from the principal before contacting teachers, coaches, etc.

3. Procedures:

3.1 General Information (see the "Finance and Accounting Manual" for detailed information)

3.1.1. Budgets: School employees have a moral and legal responsibility to make sure that money is spent in the appropriate manner. Part of that responsibility is staying within budgets and realizing that money comes from many different sources. All money is District and public money. Any inappropriate use of school or District funds may result in disciplinary action up to and including removal, and referral for criminal prosecution.

3.1.2. Records: All School and District files must be properly documented and maintained so that auditors from grant and contract agencies, or state and district auditors can verify that all laws and policies are being properly followed.

3.1.3. School Purchase Orders: No school purchases are to be made without a school purchase order that has been properly approved, prior to the purchase. The school and/or District will not be responsible to pay for financial obligations made that are not in accordance with this policy. In completing a purchase order, the cost of the items are to be recorded at their actual price (including freight costs), or as close of an estimate as possible if actual prices are not known.

3.1.4. Purchase Order Guidelines: Purchases using District budgeted funds, must be done on District purchase order forms, approved by appropriate District personnel in accordance with District procedures as directed in the purchasing handbook.

3.1.5. Personal Use Prohibited: No purchase shall be permitted through a school or the District for employee's or student's personal use (other than specific project materials designed for student instruction or school activity purposes)

3.1.6. Small Purchases: The Superintendent and Procurement Officer shall be the only persons authorized to obligate the District for purchase of items over $1,000 in cost and up to $50,000. Purchases beyond this amount must be approved by the Board of Education. School principals may authorize purchases up to $1,000 for District-level accounts and $5,000 for school accounts (9-9-03)(4-12-05) in accordance with the District policy and within the school's budget. No other person has the right to purchase in the name of the District except by explicit authorization of the Superintendent, Business Administrator, or Purchasing Coordinator.

3.1.7. Local Markets: Local sources are preferred and should be suggested whenever possible after giving consideration where pricing and quality are comparable.

3.1.8. State Contracts: Items available under statewide contracts or similar agreements may be procured under such agreements when it is in the best interest of the District.

3.1.9. Bidding Requirements: In most instances, price competition is the best way to make money go further. The District must get competitive pricing above certain dollar levels and award contracts to the business with the lowest acceptable quote consistent with quality, quantity, and delivery requirements. However, the lowest bid may not always be the best interest of the District. It is the District's responsibility to make sure that the items being purchased, meet or exceed specifications and that all information regarding decisions is documented. A state statute controls competition. Some commodities and services lend themselves to annual and/or biannual bids. The practicality of this type of bidding will be determined by the Purchasing Department. These types of long-term agreements will be secured when in the best interest of the District.

3.1.10. Emergencies: Emergencies are unforeseen situations beyond anyone's control, which need immediate attention to avoid a serious problem or a financial loss. When true emergencies occur, the District Office will help to expedite all requests. Please remember, however, that an emergency situation is exactly what it says. Individuals who habitually use this means to meet their purchasing needs are not being fair to other schools, to the District Office or to themselves, because quick is not always wise buying. You may end up paying more. Telephone requests for purchase orders should be limited to emergencies. The only exception to this is in the case of emergency when loss or harm will result without immediate action and only when the appropriate administrator cannot be reached.

3.1.11. Claim Sheets: Claim Sheets are restricted in their use and are a method of paying for or receiving reimbursement on items that meet the criteria as outlined in the purchasing handbook.

3.1.12. Damaged Equipment and Supplies: The District Office will help in resolving problems with damaged equipment or supplies from vendors and freight companies.

3.1.13. Inventory: The Inventory Control Department is responsible for the monitoring and safeguarding of all WCSD Fixed Assets by tracking and maintaining all inventory. The assigned "Inventory Contact" person for each school/department is responsible for obtaining barcodes from the Inventory Control Department and tracking those items according to the guidelines in the inventory handbook.

3.1.14. Repair of Equipment and Facilities: Repairs on equipment and facilities are generally handled by the District Maintenance and Custodial Departments.

3.1.15. Replacement of Stolen or Vandalized Equipment and Facilities: Follow the procedure as set forth in the purchasing handbook.

3.1.16. Transfer, Surplus, and Condemnation of Equipment and Furnishings: Only those in the District who have been authorized to transfer, declare surplus, or condemn equipment and furnishings may do so according to the guidelines as set forth in the purchasing handbook.

3.1.17. School Financial Accounting: It is the responsibility of each school to insure that all District funds are being properly reported, that funds are adequately safeguarded, and that maximum efficiency is being attained from the use of those funds.

3.1.18. Student Purchases: All items purchased for resale to students for school projects are to be properly receipted and turned in to the appropriate Office for daily bank deposit. Shop cards are to be purchased by students through the school Office only. No school related monies are to be stored by individuals in desks or other areas. All receipt books and other documents are to be properly stored in the school office for auditing and historical purposes. For items purchased for resale with District funds, the proceeds collected are to be paid to the School District Office on a monthly basis during the school year.

3.1.19. Student Activity Funds: It is the responsibility of each school to insure that all expenditures are directed for the legitimate benefit of the specified organization to which the funds have been dedicated.

3.1.20. Electronic Files: All final versions of electronic files used to communicate budget, accounting, or purchasing information to the finance office, must be in a format that is not editable by the submitter after its submission. Acceptable formats include, but are not limited to, PDF file, Excel sheet, Word document, or printed copy.