

<b>Bartlett City Board of Education</b>		<b>2015</b>
Descriptor Term: <b>PURCHASING</b>	Descriptor Code: <b>Fiscal Management</b>	Issue Date: <b>02/27/2014</b>
	Rescinds:	Revised: <b>01-23-2020</b> <b>06-27-2024</b>

1 **Purchasing Authority**

2 Bartlett City Schools will purchase competitively without prejudice and seek maximum educational  
3 value for every dollar expended. The Superintendent shall serve as purchasing agent for District-  
4 wide purchasing,<sup>1</sup> and Principals shall serve as purchasing agents for individual schools. The  
5 acquisition of services, equipment, and supplies shall be centralized in the Purchasing  
6 Department with the approval of the Superintendent. All purchases of supplies, furniture, fixtures,  
7 and material of every kind that are subject to competitive bid requirements shall be approved by  
8 the Superintendent.

9 Routine purchases including supplies, furniture, fixtures, materials, equipment, and salaries  
10 required for the operation of the school system shall be anticipated and provided for in the budget  
11 and shall be authorized by the Board each fiscal year. The Superintendent or his/her designee  
12 through the Purchasing Department shall make all routine purchases without further Board  
13 authorization. However, no purchase shall exceed the function's budgeted authorization without  
14 Board approval.

15 Purchases which are not routine, and which may or may not be specifically identified by line item  
16 in the budget shall require Board approval on an item-by-item basis. Such special purchases  
17 include, but are not limited to, all capital expenditures such as vehicles, buildings, major  
18 equipment, long-term use equipment, major contracts, and supplies of an unusual quantity or  
19 nature.

20 The Superintendent and his/her designee shall be authorized to acquire federal surplus property  
21 through the Tennessee General Services Department and to enter into agreements, certifications,  
22 and covenants of compliance concerning the use of federal surplus property.

23 The Superintendent is further empowered to waive normal purchasing requirements and to  
24 authorize procurement in the event of an operational emergency as defined below. However, if  
25 the emergency purchase is of such significant magnitude as to impact the integrity of the budget,  
26 then whenever possible the Chairman shall call a special or emergency meeting of the Board to  
27 deal with the matter. A report of the circumstances of any emergency purchase shall be presented  
28 to the Board and entered into the minutes of the next Board of Education meeting.

---

<sup>1</sup> T.C.A. §49-2-206(3); T.C.A. §6-36-115

1 The Board recognizes that online purchasing may provide savings opportunities that serve the  
2 best interest of the District, but caution should be used to ensure that procurement procedures  
3 are followed. Online purchasing shall be permitted consistent with the purchasing procedures  
4 described herein.

5 **Competitive Bid Requirements**

6 All purchases of supplies, furniture, fixtures, materials, equipment, and services in excess of  
7 Twenty-Five Thousand Dollars (\$25,000) shall be made based on competitive bids and must be  
8 approved by the Superintendent.<sup>2</sup>

9 Bids shall be solicited by advertisement through a comprehensive list of vendors or through a  
10 newspaper of general circulation in Shelby County. A comprehensive list of vendors may be used,  
11 provided that vendors on the list are given notice to bid, and provided further, that the Purchasing  
12 Department shall annually solicit for prospective vendors in a newspaper of general circulation in  
13 Shelby County and by publication on a news and information website in accordance with state  
14 law<sup>3</sup> and update the comprehensive vendor list accordingly. If a comprehensive vendor list is not  
15 used, then an advertisement shall be circulated by newspaper as indicated above.

16 All purchases of supplies, furniture, fixtures, materials, equipment, and services totaling Twenty-  
17 Five Thousand Dollars (\$25,000) or less shall be made in the open market without public  
18 advertisement. However, whenever possible, such purchases totaling between Two Thousand,  
19 Five Hundred Dollars (\$2,500) and Twenty-Five Thousand Dollars (\$25,000) shall be based on  
20 at least three (3) competitive quotations or justification as to why three (3) quotations were not  
21 obtained.<sup>4</sup> Notwithstanding the foregoing, individual school purchases totaling between Five  
22 Hundred Dollars (\$500) and Twenty-Five Thousand Dollars (\$25,000) shall be based on at least  
23 three (3) competitive quotations pursuant to the Tennessee Internal School Uniform Accounting  
24 Policy Manual.

25 Separating or splitting an order to avoid the use of competitive bidding or other procurement  
26 requirements is strictly prohibited. Employees found in violation of this provision may be subject  
27 to discipline, up to and including dismissal.

28 **Exceptions to Competitive Bidding**

29 The following are exceptions to the competitive bidding requirement:<sup>5</sup>

- 30 1. Professional Services Contracts. Professional services are defined as services provided  
31 by an individual or group with specialized training or expertise and shall be awarded on  
32 the basis of recognized competence and integrity.<sup>6</sup> Professional services include, but are

---

<sup>2</sup> T.C.A. §49-2-203(a)(3); T.C.A. §12-3-1212; T.C.A. §12-3-1204(b)

<sup>3</sup> T.C.A. §1-3-120(f)

<sup>4</sup> T.C.A. §49-2-203(a)(3)(A)-(B); T.C.A. §49-2-206(b)(2);  
T.C.A. §12-3-1212; Public Acts of 2024, Chapter No. 513

<sup>5</sup> T.C.A. §49-2-203(a)(3)(A)-(B); T.C.A. §49-2-206(b)(2);  
T.C.A. §12-3-1212; Public Acts of 2024, Chapter No. 513

<sup>6</sup> T.C.A. §12-3-1209; T.C.A. §12-4-107; T.C.A. §29-20-407

1 not limited to, financial advisory services, educational consulting services, legal services,  
2 construction management services that are provided for a fee and that involve  
3 preconstruction and construction administration and management services, insurance  
4 services, auditing services, engineering services, professional development services, and  
5 energy-related services that include both engineering services and equipment, and have  
6 as their purpose the reduction of energy costs in public schools.

- 7 2. Liability Insurance purchased through a plan authorized and approved by any organization  
8 of governmental entities representing cities and counties.
- 9 3. Purchases of goods or contracts for services from sole source and single source  
10 providers. Sole source providers are defined as suppliers of goods and services exempt  
11 from competitive bidding requirements due to the absence of another supplier capable of  
12 providing the product or performing the service. Single source provider is defined as one  
13 of a number of suppliers of goods and services which, for an acceptable reason, is  
14 uniquely qualified to meet the District's procurement goals due to specific qualifications or  
15 attributes. Such qualifications or attributes include, but are not limited to, availability of  
16 product, compatibility with existing District products, standardization of the product with  
17 existing District products, and grant or contract requirements.
- 18 4. Cooperative Purchasing. Cooperative purchasing is defined as purchases of supplies,  
19 equipment, and services under a competitive bid issued by any municipality, county, utility  
20 district, the State of Tennessee, or other local governmental unit of the State.
- 21 5. Emergency Purchases. Emergency purchases are defined as purchases of any parts,  
22 supplies, or services in the event of an operational emergency. Operational emergencies  
23 include major disruptions to educational activities or unforeseen dangers to life, health,  
24 safety, or property that create an immediate purchasing need that cannot be met through  
25 normal purchasing methods. A report of the circumstances of any emergency purchase  
26 shall be presented to the Board and entered into the minutes of the next Board of  
27 Education meeting.
- 28 6. Purchases of fuel in bulk amounts that would exceed the bid limits may be made in the  
29 open market without public advertisement or competitive bidding. Whenever possible,  
30 however, at least three (3) documented quotes shall be obtained.<sup>7</sup>

31 All purchases in this category exceeding One Hundred Thousand Dollars (\$100,000) must be  
32 approved by the Board.

### 33 **Purchasing Procedures**

34 All requisitions shall be approved by the Principal for school purchases or the appropriate  
35 Department head for Central Office purchases and submitted to the Superintendent on forms  
36 provided by the Purchasing Department. Requisitions shall include the following:

- 37 1. Department making request
- 38 2. Items requested
- 39 3. Reason for request
- 40 4. Line-item expense code
- 41 5. Assurance of funds availability
- 42 6. Three (3) bids or justification as to why three (3) bids were not obtained; and
- 43 7. Authorized signature of Department head (or approved budget manager)

---

<sup>7</sup> T.C.A. §12-3-12(a)

1 All District purchases shall be made by purchase order or formal contract, and no purchase shall  
2 be made, nor payment approved unless covered by an approved purchase order. The  
3 Superintendent shall approve all District purchase orders for payment.

4 Principals may approve purchase orders of up to Twenty-Five Thousand Dollars (\$25,000) for  
5 supplies, equipment, or services when such expenditures do not exceed the school budget and  
6 will be completed in the current fiscal year. Notwithstanding the foregoing, the Superintendent  
7 shall approve the following school purchases:

- 8 1. A single piece of equipment costing more than Five Thousand Dollars (\$ 5,000.00);
- 9 2. One that is to be attached to or one that requires alteration of the building; or
- 10 3. One that will become a permanent fixture.

11 Online purchasing shall be permitted with the following requirements:

- 12 1. Prior authorization must be obtained from the Superintendent before setting up new online  
13 accounts, and schools shall maintain a list of all accounts.
- 14 2. Online purchases must be for school purposes and made in accordance with established  
15 policies and procedures. School employees are prohibited from making personal  
16 purchases even with the intent of reimbursing the school system. School employees are  
17 prohibited from using a school's tax-exempt status for personal purchases of any kind.<sup>8</sup>
- 18 3. The availability of money for the fund/account in question should be determined through  
19 the requisition process before purchase orders are approved.
- 20 4. All purchase orders must be properly filled out and approved prior to a purchase.
- 21 5. Necessary price quotes should be obtained where possible and/or practical and retained  
22 with other purchase documentation.

### 23 **Disclaimers and Restrictions**

24 Purchases made by unauthorized individuals or made in an unauthorized manner shall become  
25 the personal responsibility of the persons making the purchase agreement. Employees  
26 authorizing or contracting for such purchases may be subject to discipline, up to and including  
27 dismissal. The Board shall not, under any circumstances, be responsible for payment for any  
28 services, equipment, fixtures, materials, or supplies, purchased by unauthorized individuals or in  
29 an unprescribed manner.

30 Private contacts between all District officers, employees, and suppliers shall be minimized upon  
31 the accepted premises that contact other than discussion in an open public forum compromises  
32 the District in its responsibility to deal openly and fairly with all persons. If engaged, such contacts  
33 should be made equally available to all suppliers. Further, consistent with Policy 5024: Ethics, all  
34 BCS employees shall avoid any conflict of interest or appearance of impropriety between their  
35 personal interest, financial or otherwise, and the interests of the District. In cases of uncertainty,  
36 an employee should request a ruling from the Superintendent.

---

<sup>8</sup> T.C.A. §49-2-608(1)