

1 **Charlo Public School District**

2
3 **FINANCIAL MANAGEMENT**

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4
5 Purchasing

6
7 Authorization and Control

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9 The Superintendent is authorized to direct expenditures and purchases within limits of the
10 detailed annual budget for the school year. The Board must approve purchase of capital outlay
11 items, when the aggregate total of a requisition exceeds Five Thousand Dollars (\$5,000), except
12 the Superintendent shall have the authority to make capital outlay purchases without advance
13 approval when necessary to protect the interests of the District or the health and safety of staff or
14 students. The Superintendent will establish requisition and purchase order procedures to control
15 and maintain proper accounting of expenditure of funds. Staff who obligate the District without
16 proper authorization may be held personally responsible for payment of such obligations.
17

18 Bids and Contracts

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20 Whenever it is in the interest of the District, the District will execute a contract for any building
21 furnishing, repairing, purchasing or other work for the benefit of the District. If the sum of the
22 contract or work exceeds Eighty Thousand Dollars (\$80,000), the District will call for formal
23 bids by issuing public notice as specified in statute. Specifications will be prepared and made
24 available to all vendors interested in submitting a bid. The contract shall be awarded to the
25 lowest responsible bidder, except that the trustees may reject any or all bids as per § 18-4-307,
26 MCA as stated below in the legal reference. The Board, in making a determination as to which
27 vendor is the lowest responsible bidder, will take into consideration not only the amount of each
28 bid, but will also consider the skill, ability, and integrity of a vendor to do faithful, conscientious
29 work and to promptly fulfill the contract according to its letter and spirit. Bidding requirements
30 do not apply to a registered professional engineer, surveyor, real estate appraiser, or registered
31 architect; a physician, dentist, pharmacist, or other medical, dental, or health care provider; an
32 attorney; a consulting actuary; a private investigator licensed by any jurisdiction; a claims
33 adjuster; or an accountant licensed under Title 37, Chapter 50.
34

35 Advertisement for bid must be made once each week for two (2) consecutive weeks, and a
36 second (2nd) publication must be made not less than five (5) nor more than twelve (12) days
37 before consideration of bids.
38

39 The Superintendent will establish bidding and contract-awarding procedures. Bid procedures
40 will be waived only as specified in statute. Any contract required to be let for bid shall contain
41 language to the following effect:
42

43 *In making a determination as to which vendor is the lowest responsible bidder, if*
44 *any, the District will take into consideration not only the pecuniary ability of a*
45 *vendor to perform the contract, but will also consider the skill, ability, and*
46 *integrity of a vendor to do faithful, conscientious work and promptly fulfill the*

contract according to its letter and spirit. References must be provided and will be contacted. The District further reserves the right to contact others with whom a vendor has conducted business, in addition to those listed as references, in determining whether a vendor is the lowest responsible bidder. Additional information and/or inquiries into a vendor's skill, ability, and integrity are set forth in the bid specifications.

Cooperative Purchasing

The District may enter into cooperative purchasing contracts with one or more districts for procurement of supplies or services. A district participating in a cooperative purchasing group may purchase supplies and services through the group without complying with the provisions of 20-9-204(3), MCA if the cooperative purchasing group has a publicly available master list of items available with pricing included and provides an opportunity at least twice yearly for any vendor, including a Montana vendor, to compete, based on a lowest responsible bidder standard, for inclusion of the vendor's supplies and services on the cooperative purchasing group's master list.

Legal Reference:	§ 18-1-101, et seq., MCA	Preferences and General Matters
	§ 18-1-201, et seq., MCA	Bid Security
	§ 18-4-307, MCA	Cancellation of invitations for bids or requests for proposals
	§ 20-9-204, MCA	Conflicts of interests, letting contracts, and calling for bids - exceptions
	§ 20-10-110, MCA	School Bus Purchases – contracts- bids
	<i>Debcon v. City of Glasgow</i> , 305 Mont. 391 (2001)	

Policy History:

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