



FORMAL BID PROCEDURE (PUR-P004)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the manner in which all purchases for amounts of more than \$10,000 are secured when the purchase can be obtained from more than one vendor.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Purchasing Director (PD)

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Financial Officer (CFO)

4.0 DEFINITIONS:

- 4.1 Special Purchase: Purchases exceeding \$25,000 that are not routine and not previously approved in the budget. Examples include capital expenditures such as buildings and vehicles or items for long-term use.
- 4.2 Lowest and Best Price: The lowest price bid needs to meet the specified criteria of the item/service identified. If the bid does not meet criteria the next lowest price is evaluated.

5.0 PROCEDURE:

- 5.1 Any CMCSS employee requesting a purchase for an amount exceeding \$10,000 must provide written specifications to the Purchasing Director.
 - 5.1.1 Specifications are reviewed for accuracy and funding availability is confirmed.
- 5.2 Vendors from the prospective bidder list are mailed an Invitation to Bid (PUR-F005).
- 5.3 Bids are required to be returned to CMCSS by the date and time specified in the bid request. Time of return is determined based on nature of the goods or services requested and/or the complexity of the specifications. Bids are generally required to be returned within 2 weeks.
- 5.4 Bids are publicly opened at the designated time.
- 5.5 The Purchasing Director:
 - 5.5.1 Evaluates the bids for the lowest and best price, and
 - 5.5.2 Recommends the awarding of the bid.
- 5.6 If the purchase is not a special purchase, the Purchasing Director initiates a purchase request (ref. [PUR-P002](#)).



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5.7 Special purchases are reviewed by the School Board for approval.

5.7.1 If the board does not approve the special purchase, the bid is canceled and the vendor notified.

5.7.2 If the School Board approves the bid, the Purchasing Director initiates a purchase request (ref. [PUR-P002](#)).

6.0 ASSOCIATED DOCUMENTS:

6.1 Invitation to Bid (PUR-F005) not available via web

6.2 Purchase Order Procedure ([PUR-P002](#))

6.3 Bidders List

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Formal bid file with bid request form	File cabinet or vault	Current plus six years	Recycled	Secured Building

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/13/03		Initial Release
3/03/03	A	Correct numbering in 5.7
10/02/08	B	Replacing PUR-F011 with PUR-F005 in 5.2 and Associated Documents, update flowchart
11/11/11	C	Changed "Agent" to "Director", changed wording on more than \$10,000. Updated logo.

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

***** End of procedure *****

Formal Bid (PUR-P004)

