

# Lisbon School District

15 Newent Road  
Lisbon, CT 06351

3323

## Business and Non-Instructional Operations

### Soliciting Prices/Bidding Requirements

#### Definitions

For the purposes of this policy:

**Invitation to Bid:** This process requires development of specs, advertisement and submission of bids for review in a public setting.

**Quote:** This process requires requests for pricing on goods or services from qualified vendors.

**Estimate:** This process requires gathering information about pricing on a needed good or service from websites, catalogs, verbal or written request for information.

All purchases shall be made after careful review of pricing and after consideration of a cooperative agreement with the municipality. All purchases will be granted to the most qualified contractor or supplier with the lowest pricing, deemed best able to provide the goods and/or services desired, taking into account cost and project requirements, the skill, ability and integrity of the vendor and all of the factors set forth in policy #3320. Determination of cost category (bid, quote, or estimate) will be made based on the cost of an item not the total amount of a budget line item.

In the interest of maintaining relationships that are beneficial to the District, extensions of a contracted service may be granted up to three times after the initial signing of the contract without going through the formal purchasing process. These extensions may occur only if the administration and the Board of Education are in agreement that the contract should be extended and that a rate increase may occur.

#### **Purchases less than \$5,000**

Purchases of goods or services which involve an expenditure of less than \$5,000 may be made directly, without regard to any bid or quotation process. Every effort shall be made to obtain the required good or service in the most cost effective manner.

#### **Purchases greater than \$5,000 but less than \$10,000**

Purchases of goods or services expected to involve an expenditure of \$5,000 to \$10,000 may be done through estimates. Oral or written estimates may be obtained from current catalogs or price sheets. Documentation of estimates should be retained by the business manager for future reference.

#### **Purchases greater than \$10,000 but less than \$25,000**

All purchases greater than \$10,000 but less than \$25,000 in amount shall be based on at least three competitive quotations. Quotations, either oral or written, shall be obtained from at least three vendors. The refusal of an otherwise valid supplier to quote shall qualify as a quotation. The quotation process does not require a public opening, and the Superintendent of Schools or designee may send requests to a limited number of selected vendors. Documentation of estimates should be retained by the business manager for future reference.

**Purchases greater than \$25,000**

Contracts for, and purchases of supplies, materials, equipment and contractual services in the amount of \$25,000 or more shall be in accordance with the bid process set forth in this policy. All purchases in the amount of \$25,000 or more must be awarded by the Board or its designee. The Superintendent of Schools or designee shall develop the proposed bid specifications and other bid documents. Bids shall be advertised at least once. All bids must be submitted and plainly marked with the name of the bids and the time of the opening. Bids shall be opened in public and read aloud at the time specified and all bidders and other interested persons shall be invited to be present.

Lisbon Central School reserves the right to reject any or all bids and to accept that bid which appears to be in the best interest of the Town. Lisbon Central School reserves the right to waive any informality in, or reject, any or all bids or any part of any bid. Any bid may be withdrawn prior to the scheduled time for the opening of bids. Any bid received after the time and date specified shall not be considered.

Lisbon Central School, after going out to bid for a good or service and receiving submissions, shall consult with the Town's legislative body to determine whether the equivalent level of such good or service is provided by the Town or through a Town contract for a lower cost than the lowest qualified bid received by the school district. In such situations, the district shall consider a cooperative arrangement with the Town for the provision of such good or service. A "good or service" includes but is not limited to, portable classrooms, motor vehicles or materials and equipment, such as telephone systems, computers and copy machines.

A letter will be sent to the successful bidder announcing the award of the bid. All unsuccessful bidders will be sent a letter notifying them that they were not selected.

**Waivers**

In certain situations, the bidding, quotation and estimate processes described above may be waived even though the estimated cost exceeds the dollar threshold established by the Board.

The formal processes may be waived for any of the following reasons:

- 1) Only one reasonable or qualified source can be identified.
- 2) The purchase is for special or professional services where a specific vendor must be used due to the unique nature of the service required.
- 3) Time is a critical factor, and taking the time necessary to comply with the formal process would not be in the best interests of the school district.
- 4) In the opinion of the Superintendent or designee, an emergency requires the purchase of goods or services to avoid injury or damage to human life or property. Lisbon Board of Education
- 5) A special source including but not limited to a sale, purchasing plan, government discount or trade-in allowance will supply a lower cost than that which would result from a formal purchasing process.
- 6) A formal purchasing process would result in substantially higher costs to the school district, or inefficient use of personnel, or cause substantial disruption of school district operations.
- 7) Prices of goods or services are subject to specific federal or state competitive bidding requirements, including, but not limited to "school building projects" as defined in the Connecticut General Statutes.
- 8) Regional or cooperative or consortium purchases.
- 9) Services of attorneys, physicians, architects, or other professionals when the extent and cost of such services cannot be readily determined.
- 10) Expenditures arising from goods or services provided by the State of CT under the State Town Aid Program or any other State program.

- 11) Any purchase made through a State of CT contract, including contracts administered by the Department of Administrative Services.
- 12) Cooperative agreement with the local municipality.
- 13) Curriculum materials.
- 14) Services and materials required under Individualized Education Programs and 504 Plans.

Any waiver must be granted by Superintendent of Schools or designee. The Business Manager will keep a report of waived expenditures.

Legal Reference: Connecticut General Statutes

P.A. 13-71 An Act Concerning Requirements for Competitive Bidding for the Award of Contracts or Purchase of Property by Municipalities  
June 2017 Special Session PA 17-2, Section 161

**Policy Adopted: 04/23/2018-Lisbon Board of Education**

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