**General Overview**

The Purchasing Department’s goal is to obtain the best value for goods and services for the students, teachers, administration and staff of the Syracuse City School District while maintaining compliance with all Board of Education policies and applicable government rules and regulations.

The Purchasing Department will always strive to obtain goods and services which meet or exceed the quality, service, price and delivery requirements that satisfy the District’s needs and mission. In doing so, the Purchasing Department contributes to the success of the District’s vision, mission and strategic plans.

Below is a list of procurement methods generally used by the Syracuse City School District to purchase goods and services. Regardless of what procurement method is used, the District is responsible to ensure that the price being paid is fair and reasonable given the circumstances of the procurement. These are basic guidelines. Please reference the applicable laws and regulations for complete requirements.

**Procurement Methods**

1. **Formal Competitive Bidding**

Definition

The process of obtaining competitive bids using request for bid documents, public advertising, sealed bids and public bid opening resulting in award to the responsible and responsive bidder with the lowest price meeting the bid specifications.

Related Rules and Regulations

NYS General Municipal Law Section 103 requires purchase contracts for commodities, equipment and goods involving an aggregate expenditures exceeding $20,000 and public works contracts (construction and service contracts) involving an expenditure of more than $35,000 within a twelve-month period will be awarded only after responsible bids have been received in response to a public advertisement soliciting formal bids.

The City of Syracuse Charter further requires that purchase contracts involving an aggregate expenditures exceeding $20,000 and public works contracts involving an expenditure of more than $35,000 within a six-month period will be awarded only after responsible bids have been received in response to a public advertisement soliciting formal bids.

Exceptions to Formal Competitive Bidding Requirements:

* + NYS Contracts
  + County Contracts
  + True Emergencies
  + Surplus and Second-Hand Equipment from other Agencies
  + Municipal Cooperation/Use of Municipal Employees
  + Food and Milk purchases by School Districts
  + Certain Municipal Hospital purchases
  + True Leases/Licenses/Concessions
  + Professional Services
  + Sole Source
  + Preferred Sources or City Ordinances that waive advertising and competitive bidding requirements

1. **Request for Proposal (RFP)**

Definition

This method is an alternate to, not a replacement of, formal competitive bidding generally for services where factors in addition to pricing need to be considered.

Procedures

This procurement method is typically used for Best Value competitive purchases where other factors are considered in the award in addition to pricing, instead of Lowest Price competitive purchases which are awarded to the responsible vendor offering the lowest price. Purchases for Professional Services (i.e. attorneys, physicians, engineering, surveying, consultants) frequently use this method.

1. **Formal Quote**

Definition

A formal quote is required for purchases of goods and/or services greater than $3,000 and less than $20,000.

Procedures

A written Request for Quote (RFQ) is utilized and a minimum of three (3) legitimate written quotes are solicited and attempted to be obtained.

1. **Informal Quote**

Definition

An informal quote is required for purchases of goods and/or services greater than $1,500 and less than or equal to $3,000.

Procedures

A verbal Request for Quote (RFQ) and a minimum of three (3) legitimate verbal quotes are solicited and attempted to be obtained. Verbal quotes or website cart pricing are to be summarized in written form documenting the vendor, vendor representative who provided the quote, date of contact and price quoted.

1. **Open Market (Discretionary)**

Definition

Purchases of goods and/or services up to an amount of $1,500.

Procedures

A vendor website shopping cart or catalog is obtained to confirm pricing and other vendor requested terms and conditions.

1. **NYS Preferred Source**

Definition

Preferred Sources who are exempt from competitive procurement provisions including competitive bidding requirements as defined by NY State Finance Law Section 162.

Procedures

Purchases of commodities and services, when available in the form, fit, function and utility as required by the District, are required to be made through these Preferred Sources:

* 1. Corcraft
  2. NYS Industries for the Disabled (NYSID)
  3. Industries for the Blind of NYS, Inc.
  4. NYS Office of Mental Health

1. **NYS Government Contracts**

Definition

The District may use NYS government contracts bid and awarded on a competitive basis in accordance with NYS General Municipal Law Section 103, instead of processing a separate formal bid. These contracts must include an allowance to be used by other NYS agencies/political subdivision such as the District and is contingent upon the vendor’s agreement to accept the purchase request.

Procedures

Notwithstanding other restrictions, the following government agency contracts are eligible under this allowance:

* + City of Syracuse
  + Onondaga County
  + NYS Office of General Services (OGS)
  + Other NYS Counties

Certain agency contracts are not allowed to be used by the District which include:

* BOCES commodity contracts
* GSA contracts except Schedule 70 (Technology).

1. **Cooperative Procurement Contracts**

Definition

Municipal corporations and districts are authorized by NYS General Municipal Law Section 119 to enter in to cooperative purchase agreement.

Procedures

Any such agreement must be approved by a majority vote of the members of the governing board of each municipal corporations and district before use.

1. **Federal/State/Procurement Alliance Contracts (Piggybacking)**

Definition

As an exception to competitive bidding under NYS General Municipal Law Section 103, political subdivisions are authorized to purchase certain allowed goods/services through the use of contracts led by the United States or any agency thereof, any state or any other political subdivision or district therein.

Procedures

To determine if whether any procurement falls within this exception, there are a number of prerequisites must be evaluated. Use of contracts based on “piggybacking” should be discussed with the Purchasing Department before any purchase is initiated to determine if the contract is eligible and to avoid procurement cycle delays.

1. **Contracts/Memorandum of Agreements/Consultancy Agreements**

Definition

Contracts, Memorandum of Agreement (MOA) or Consultancy Agreements approved by the Board of Education.

Procedures

If approved through a Board of Education Resolution, the District is authorized to negotiate and execute agreements/contracts with various government and non-government entities. All contracts will require signatures from both the Superintendent of Schools and a Chief as appropriate, depending on the operating contracts (See BOE RES 051413 for specific requirements).

1. **Directed Purchases for Grants**

Definition

The approved grant application specifically references which vendor will be used to provide services or to purchase goods from or the awarding agency only allows funds to be spent at a specific vendor as part of the award.

Procedures

If approved by BOE Resolution, SCSD is authorized to make expenditures of grant funds, should funds be awarded. Directed Purchases are those grant funded purchases that identify specific goods/services or vendors that are required to be used in order to be compliant with the scope of work of the approved grant. Any other grant funded purchases shall be made in accordance with NYS General Municipal Law Sections 103, 104-a and the District’s standard purchasing policies and procedures.

1. **True Emergency Purchase**

Definition

NYS General Municipal Law sets forth an exception to bidding requirements for emergency situations. A public emergency may arise out of an accident or other unforeseen occurrence or condition which could affect public buildings, public property or the life, health, safety or property of the inhabitants. These situations require immediate action which cannot await competitive bidding. Emergencies do not include situations that are avoidable, or resulted from inaction, lack of planning or dilatory conduct on the part of a political subdivision official.

Procedures

The Purchasing Department should be notified of any purchases which may qualify as emergency purchases before the purchase is made. The Purchasing Department will evaluate the situation to determine if this exemption is applicable.

1. **Sole Source**

Definition

A Sole Source procurement is an exception to competitive bidding under NYS General Municipal Law Section 103. A Sole Source purchase is a defined as a situation when there is only one possible source from which to procure goods and/or services and it is shown that the items needed has unique benefits, the cost is reasonable for the product offered and there is no competition available.

Procedures

For a Sole Source purchase, a sole source letter from the vendor should be requested and obtained by the requester. Upon Purchasing sole source approval, Buyer will verify letter is attached to PO and place copy of sole source justification/verification letter in SCSD Public Purchasing Drive file for Procurement Record reference for future procurements. Sole Source purchases within the discretionary dollar limits are classified as Open Market/Discretionary.

1. **Single Source**

Definition

A Single Source purchase is a procurement made from one source of many that can provide the product or service.

Procedures

Typically, a Single Source procurement is a method only used under a discretionary or emergency purchase. This procurement method is never used by the District as a primary procurement method itself.

**Procurement Type Reference**

This is a list of procurement types references commonly entered in the “Additional Information” field by the person entering a requisition in PeopleSoft. These procurement type references describe the specific contract number, agreement number, BOE Resolution identifier, quote number, type of procurement, etc. The information in this field is used to confirm and verify the origin of the requisition pricing, indentify applicable terms and conditions of the purchases and give insight into the procurement method by utilizing the information on the requisition and the attached supporting documentation.

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| **Procurement Type Reference** | **Example** |
| NYS Preferred Source | NYSID, CORCRAFT, etc. |
| State Bid Contract | PC12345, PT12345, PS12345, etc. |
| Onondaga County/SCSD Bid Contract # | RFB7662, RFB7343, RFB7367,etc. |
| City of Syracuse Bid Contract # | 09-176, 10-163, 11-145, etc. |
| Federal GSA Contract # | GSA GS-07F-0440N, etc |
| Other Government Bid Contract/Agreement # | Contract#123456 |
| City of Syracuse Ordinance # | 371-13, 369-13, 370-13, etc. |
| Formal Quotes | QUOTE#123456 03/25/13 |
| Informal Quotes | QUOTE#123456 01/02/13 |
| Discretionary Purchase | OPEN MARKET 123456 |
| Contracts/Agreements/Consultants | MOA#1234, CONTRACT#1234, BOE RES #051413 |
| City of Syracuse/SCSD RFP Contract | RFP12-345, RFP13-667, RFP13-789, etc. |
| Directed Purchase of Grants | DIRECTED |
| Sole Source | SOLE SOURCE |
| Emergency | EMERGENCY |
| Exempt Public Utilities & Services | EXEMPT |
| Rentals/Leases | RENTAL ,LEASE |
| Field Trips | FIELD TRIP |
| Dues/Fees/Registrations | DUES, FEES, REGISTRATION |
| Professional Services (Non-RFP) | PROFESSIONAL SERVICES |
| Subscriptions | SUBCRIPTIONS |
| Off-Site Conference/Meeting | CONFERENCE |
| Airline/Hotel Reservations | RESERVATIONS |
| Business Breakfast/Luncheon Meetings | CATERING |