



DINWIDDIE COUNTY PUBLIC SCHOOLS PURCHASING POLICIES AND PROCEDURES

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Administered by
Dinwiddie County School Board Finance Department

*These Dinwiddie County School Board Purchasing Policies and Procedures
supersede all prior policies. Regulations and are based on the Virginia Public Procurement Act.*

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INTRODUCTION/AUTHORITY

These Dinwiddie County Public Schools Purchasing Policies and Procedures (the “Policies and Procedures”) are adopted pursuant to Section 2.2-4302 of the Code of Virginia, 1950, as amended. These Policies and Procedures and the Virginia Public Procurement Act (the “VPPA”, Sections 2.2-4300 through 2.2-4383 of the Code of Virginia, 1950, as amended, and as it may be amended from time to time), govern all Dinwiddie County Public Schools purchasing transactions. All section references in this document are to the Code of Virginia, 1950, as amended. In case of discrepancies between these Policies and Procedures and the VPPA, the VPPA requirements shall prevail.

As stated in Dinwiddie County Public Schools Policy DJA, the superintendent may designate a qualified employee to serve as the purchasing agent for the Board. In this capacity, the agent for the Board may purchase or contract for all supplies, materials, equipment, and contractual services required by the school division subject to federal and state laws and regulations and School Board policies. All contracts shall be signed by the authorized designee or School Board Clerk.

Internal Controls

The superintendent, or superintendent's designee, establishes appropriate procedures for internal accounting controls.

Purchasing and Contracting

Dinwiddie County Public Schools encourages full and open competition whenever practicable among potential contractors and suppliers by competitive bidding practices; to centralize purchasing and contracting within the school division to realize the economies resulting therefrom; and to seek maximum educational value for every dollar expended.

The Procurement Office is authorized to develop and maintain forms to implement these Policies and Procedures that are consistent therewith.

EFFECTIVE DATE

These Policies and Procedures shall take effect immediately upon adoption. Adoption Date, October 13, 2020.

DEFINITIONS

For purposes of these Policies and Procedures, the following words and phrases shall have the following meanings ascribed to them by Dinwiddie County Public Schools.

“*Procurement Office*” and/or “*Procurement Officer*”, for the purposes of these Policies and Procedures, mean the Finance Manager / Purchasing Agent or Finance Director.

“*Budget Holder*” collectively refers to the Directors and Principals of Dinwiddie County Public Schools.

“*Delegated Authority*” is granted by the superintendent to budget holders to sign purchase orders up to \$2,500.00 for procurement of goods and services.

“*Invitation for Bids (IFB)*” is the document used to solicit formal bids for large purchases where the award is determined by the lowest responsive and responsible bidder. Bids are sealed.

“*Request for Information (RFI)*” is the document used to request information from the market place regarding the technical feasibility or market price of certain goods or service specifications, or a process to assess whether there is a sufficient number of vendors in the market place to justify using an RFP.

“*Request for Quotations (RFQ)*” is the document used to solicit informal bids for small purchases where the winning bid is determined primarily by the lowest responsive and responsible bidder. Other determining factors may apply. Quotes are unsealed.

“*Request for Proposals (RFP)*” is the document used to solicit formal proposals for large purchases where the award is based on factors other than price, but where price is still a factor. Proposals are sealed.

“*Micro purchase*” is a purchase under \$5,000. Micro purchases do not require competitive bidding or competitive negotiation, although competition is encouraged, wherever practical, however at least one (1) telephonic or written quote is required.

“*Small Purchase*” is a purchase for goods and nonprofessional services in which the aggregate cost or the sum of all phases is not expected to exceed \$200,000.00 and for transportation related construction if the aggregate or sum of all phases is not expected to exceed \$25,000.00. Small purchases (\$5,000.01 - \$199,999.99) do not require competitive bidding or competitive negotiation, although competition is encouraged, wherever practical, however a minimum of three (3) telephonic or written quotes are required.

“*Large Purchase*” is a purchase for goods and nonprofessional services in which the aggregate cost or the sum of all phases is expected to exceed \$200,000.00 and for professional services in which the aggregate cost or the sum of all phases is \$80,000 or greater.

For purposes of these Policies and Procedures, the following words and phrases shall have the meanings ascribed to them by the VPPA, as it may be amended from time to time. The definitions as of July 1, 2020 are reprinted below; however, please consult the most recent version of the VPPA to ensure the definitions have not changed.

“*Best value*” as predetermined in the solicitation, means the overall combination of quality, price, and various elements of required services that, in total, are optimal relative to public body’s needs.

“*Construction*” means building, altering, repairing, improving, or demolishing any structure, building or highway, and any draining, dredging, excavation, grading or similar work upon real property.

“*Goods*” means all material, equipment, supplies, printing, and automated data processing hardware and software.

“*Nonprofessional services*” means any services not specifically identified as professional services in the definition of professional services.

“*Professional services*” means work performed by an independent contractor within the scope of the practice of accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy or professional engineering.

“*Responsible bidder*” or “*offeror*” means a person who has the capability, in all respects, to perform fully the contract requirements and the moral and business integrity and reliability that will assure good faith performance, and who has been prequalified, if required.

“*Responsive bidder*” means a person who has submitted a bid that conforms in all material respects to the Invitation to Bid.

“*Services*” means any work performed by an independent contractor wherein the service rendered does not consist primarily of acquisition of equipment or materials, or the rental of equipment, materials and supplies.

DELEGATED AUTHORITY

Budget Holders, or their designees, have the delegated authority to make micro purchases of less than \$2,500.00 without prior approval from the Procurement Office. Delegated authority does not apply to signing contracts with the exception of contracts that provide cap and gowns, photographs, class rings, yearbooks and graduation announcements for purchase or rental by students, parents, faculty or other persons using non-public money.

GENERAL PROCUREMENT GUIDELINES

1. Tax Exempt – As stated in Dinwiddie County Public Schools Policy DJ, Dinwiddie County Public Schools are exempt from sales tax for goods/services purchased in or delivered to Virginia; however, retail sales of prepared meals, charges for lodging and purchases of goods in other states are subject to sales tax. All staff making purchases on behalf of Dinwiddie County Public Schools, no matter the dollar amount, are responsible for ensuring that no taxes are added to tax exempt purchases. If taxes are added to an

exempt purchase, the employee who made the purchase is responsible for seeing that taxes are removed or credit received. Failure to remove taxes could result in the employee personally paying for taxes on that purchase. A tax exempt form is attached and also available on our web site.

2. Any authorized online purchase shall be made from an account that is set up with tax exempt status. The Procurement Office is the only department authorized to setup any new online accounts on behalf of the Dinwiddie County Public Schools. An employee's DCPS email address may not be used to setup an online account for personal purchases, as these are used to allow designated employees to make purchases from pre-authorized on-line vendors for DCPS only. A list of pre-authorized vendors is attached. Note: All Dinwiddie County Public Schools email addresses are subject to the Freedom of Information Act. (FOIA).
3. The use of the Bank of America Purchasing Card is encouraged whenever possible. See the Purchasing Charge Card Program Policy for details regarding purchases using the BOA PCards.
4. Proposed purchases must be included in the budget. If a proposed purchase is not included in the budget, approval must be received from the superintendent and/or the Director of Finance prior to beginning the procurement process.
5. Solicitations may be sent to local vendors that provide the good and/or services needed provided the total of the purchase is within the purchase dollar thresholds. The use of eVA's Quick Quote is recommended, especially when there are few local vendors from whom to purchase a particular good or service. Please see the purchasing agent for help with this process.
6. A current IRS Form W-9 must be obtained from each vendor with which the District does business. All corporations must have an active registration with the State Corporation Commission, if required. All vendors providing a service must have a current business license and certificate of insurance.
7. *Split purchases are strictly prohibited.* A split purchase is one in which the original purchase requirement for the same or similar goods or services is broken into multiple smaller purchases in order to avoid going through the formal procurement process and/or exceeding the single transaction limit on the Bank of America Purchasing Cards. This practice is illegal and could be considered fraud.
8. Purchases that will be paid for using federal funds shall comply with all applicable federal procurement standards 2 C.F.R §§200.317-200.326 stated within the grant and Dinwiddie County Public School's purchasing guidelines.

PURCHASE ORDERS

In order to process purchase orders, please adhere to the following procedures:

- Purchase Orders must be filled out completely – including account number(s). If you are ordering from a new vendor, please include the following: name, address, phone # and fax #. All new vendors are required to complete a W-9 form which should be sent in with the completed purchase order. Checks will not be issued without a completed W-9.
- *Requested by* should have the name of the person requesting the purchase.
- The *budget holder* of the account in which the Purchase Order is being charged to should initial the Purchase Order next to *Principal/Supervisor* on the bottom left- hand side of the page.
- All Purchase orders charged to Instruction accounts need to be sent to the Assistant Superintendent's office for approval before coming to purchasing agent to be signed.
- All purchase orders and applicable specifications for information technology equipment and services, including but not limited to computers, printers, telephones, mobile devices, hardware and software, must first be reviewed by the Director of Technology before coming to the purchasing agent to be signed.
- All Software purchases require approval from the Software Committee before coming to the purchasing agent to be signed.
- Any Purchase Order needing additional review based on expenditure amount should be forwarded to the Superintendent's office for approval before coming to purchasing agent to be signed.
- Purchase Orders exceeding account budget will not be processed until a budget transfer has been made. It is up to the budget holder to make sure funds are available for purchase. Purchases should be coded to the account that corresponds with the purchase type *not* the account you have money in.
- A detail of telephonic and/or written bids should be attached to the purchase order prior to coming to the Procurement Office.

Delegated vs Non-Delegated

- Any purchase of \$2,500 and under may be submitted on a delegated OR a non-delegated Purchase Order as long as the budget holder for the coded account signs the Purchase Order.
- Any purchase exceeding \$2,500 must be on a non-delegated PO and requires signature by the purchasing agent in the central office PROIR to purchase.

SMALL PURCHASE PROCUREMENT

The following guidelines shall apply to single or term contracts for goods and nonprofessional services in which the aggregate cost or the sum of all phases is not expected to exceed \$200,000.00.

The sum of a purchase equals the total cost for all phases or terms. Example: If a contract is for 3 years, the sum of the purchase = [cost per year] x 3. This total shall be used when determining how to procure a product/service.

A. Goods And/Or Nonprofessional Services Not To Exceed \$200,000.00

1. \$0.00 - \$4,999.99 (Micro Purchase)

Staff, with authority and approval of Budget Holder to proceed, shall obtain a minimum of one (1) documented bid/quote. Bids/Quotes must document item requested, vendor name, name of vendor's representative, date, phone number, and price quoted. Bid/Quote form must be attached with the Purchase Order. Staff is encouraged, but not required, to obtain more than one quote. (A form for Telephonic bids/quotes is attached.)

Staff shall make award to the vendor with the best price and shall place orders. It is recommended that payment be made via School Board P-Card when possible.

2. \$5,000.00 - \$199,999.99 (Small Purchase)

Staff, with authority and approval of Budget Holder to proceed, shall obtain a minimum of three (3) documented bids/quotes. Bids/Quotes must document vendor name, name of vendor's representative, date, phone number, and price quoted. Two (2) copies of *all* Bid/Quote forms must be attached to the Purchase Order. One will be attached to the yellow copy of the purchase order to be kept for audit purposes and the other will be returned to the requestor for their file. Staff is encouraged to check with Dinwiddie County Public Schools purchasing partners as these contracts have been vetted and awarded on a National Basis. If help is needed contacting any of our purchasing partners, please contact the purchasing agent. (A copy of Purchasing Partners is attached.)

Staff shall make award to the vendor with the best price and shall place orders. It is recommended that payment be made via School Board P-Card when possible.

Purchases in excess of \$100,000.00 will be reported to the School Board at the next meeting for informational purposes only. (DJ-R)

3. Professional Services

The budget holder shall always contact the purchasing agent to establish professional service contracts. In accordance with the code of Virginia, professional services are strictly limited to the following:

- Accounting Services
- Actuarial Services
- Architectural Services
- Land Survey Services
- Legal Services
- Engineering Services
- Medicine, Optometry and Pharmacy Services

LARGE PURCHASE PROCUREMENT

A. Goods And/Or Nonprofessional Services Where The Sum Of All Phases/Contract Periods Is Expected To Exceed \$200,000.00

1. Competitive Sealed Bidding: Invitation For Bids (“IFB”)

Purchases where the estimated total cost of materials, equipment, supplies, and/or non-professional services exceeds \$200,000.00 shall be made through the purchasing agent through advertised sealed competitive bidding. Requestor shall submit to the purchasing agent a completed Statement of Work detailing the exact goods/service needed as well as the expected due date goods /services are needed. The Purchasing Office shall use the information to prepare the Invitation for Bids (IFB), which shall set out the specifications and contractual terms and conditions applicable to the procurement. The IFB shall be approved by the Requestor prior to issuance. The purchasing agent will advertise the Invitation for Bid (IFB) on the Virginia electronic procurement website (eVA), the division website (www.dinwiddie.k12.va.us) and *may* publish in a newspaper of general circulation for at least ten (10) days prior to the date set for the receipt of bids. Additionally, the purchasing agent will solicit sealed competitive bids from known qualified sources. Sealed bids shall be due in the School Board Office at a specified date and time.

After the deadline for receipt of bids, the purchasing agent along with the requestor and/or a designee shall hold a Public Opening and review all bids and determine the lowest responsive and responsible bidder(s). Purchasing agent shall recommend to the School Board that one or more contracts be awarded to such bidder(s). Once School Board approval has been issued, the purchasing agent will notify the requestor and the vendor. A contract signed by the purchasing agent and the vendor as well as the purchase order will be issued to the vendor.

Multiple contracts may be awarded only when provided for in the IFB.

Construction may be procured only by competitive sealed bidding except as defined in Section 2.2-4303D of the VPPA.

2. Procedure Where Competitive Sealed Bids Exceed Available Funds

The school board has reserved the right to negotiate with the apparent low bidder as follows when the competitive sealed bids exceed the available funds:

- a. If competitive bids exceed available funds, the superintendent shall inform the school board and the school board will determine whether to authorize negotiation with the apparent low bidder or re-solicit bids.
- b. If the school board determines to negotiate with the apparent low bidder, notification will be given to the apparent low bidder together with suggested amendments.
- c. Negotiations will be conducted by the superintendent, or person designated by the superintendent, and may include repetitive informal meetings and discussions between the apparent low bidder and school board personnel and consultants.
- d. If the proposed addendum is within available funds, the school board may either award the contract based upon the amended proposal or reject all bids and re-solicit bids for the purchase. If the apparent low bidder is unable or unwilling to submit or negotiate an amended proposal within available funds, the school board, upon being so advised by the superintendent, shall reject all bids.

3. Professional Services Where The Sum Of All Phases/Contract Periods Is Expected To Exceed \$80,000

a. Competitive Negotiation: Request For Proposals

Budget Holders shall submit to the Procurement Office a completed request detailing the services needed. Requestors shall work with the Procurement Office to provide any specification and /or other information necessary. The Procurement Office shall use the information to prepare Request for Proposals (RFP), which shall set out the specifications, contractual terms and conditions, and criteria used to evaluate proposals. The RFP shall be approved by the Requestor prior to issuance. The purchasing agent will advertise the Request for Proposal (RFP) on the Virginia electronic procurement website (eVA), the division website (www.dinwiddie.k12.va.us) and *may* publish in a newspaper of general circulation for at least ten (10) days prior to the date set for the receipt of bids. Additionally, the purchasing agent may forward the RFP to known qualified sources. Proposals shall be due in the School Board Office at a specified date and time.

After the deadline for receipt of proposals, the pre-determined evaluation committee shall independently evaluate all proposals based on the criteria set out in the RFP and shall determine which offeror, in their opinion, submitted the best proposal. The evaluation committee will select several offerors to make oral presentations to the committee. The purchasing agent is the facilitator for these meetings but has no input in the selection of the offerors.

Once the committee makes the determination of which offeror(s) will provide the best value for Dinwiddie County Public Schools, the committee shall enter into

negotiations with such offeror. Non-binding estimates of total project costs (including man-hours) and/or price for services may be discussed beginning with the “negotiation stage”. Upon satisfactory negotiations with the offeror, the committee shall recommend to the School Board that a contract be awarded to the offeror. The contract must be approved by the School Board and signed by the offeror and the purchasing agent. The purchasing agent shall issue a purchase order to the offeror at this time.

Note: Request for Proposals (RFP) take time to develop and process. It is suggested that you contact the purchasing agent when you first realize you have a need so there will be ample time to bring all the players to the table to prepare an action plan.

EXEMPTIONS FROM COMPETITIVE REQUIREMENTS

Dinwiddie County Public Schools has determined that competition normally is either not practicable or available for purchases of the following goods and services; however at least one quote must be obtained and documented.

1. Entertainment Services (such as bands, DJs and other amusements, etc.)
2. Rental Fees
3. *Training to include on and off-site training fees*
4. Dues, Subscriptions and Memberships
5. Utility Charges
6. *Athletic Officials/Referees: Umpires, referees, and other sports officials to officiate competitive athletic and sporting events sponsored by Dinwiddie County Public Schools. The services include observing the play, detecting infractions of rules, and imposing penalties established by the rules and regulations of the various sports.*
7. Legal Services
8. Perpetual Software and Hardware Maintenance - Competitively purchased software and hardware that requires annual maintenance and support including upgrades to keep the product current, is considered both proprietary and perpetual, as maintenance cannot be provided by anyone other than the source code or current holder. For that reason, maintenance does not require the same competitive justification as other purchases so long as the original purchase is competitive and the same company provides the maintenance, until the product is no longer utilized. Using departments must verify that the price is fair and reasonable and that the product is still available.

ETHICS IN PUBLIC CONTRACTING

The provisions of Sections 2.2-4367 through 2.2-4377, as documented in the Virginia Public Procurement Act (VPPA) relating to ethics in public procurement, shall apply to all Dinwiddie County Public Schools procurements.

CONTRACTS AND APPROVALS

The provisions of Dinwiddie County Public Schools Policy DJF relating to all contract awards shall apply to all Dinwiddie County Public Schools procurements.

Any contract amendments or change orders shall be reviewed by the Procurement Office and approved by the Superintendent and the Finance Director prior to incurring additional expenses and/or completing work. No fixed-price contract may be increased by more than twenty-five percent (25%) or \$50,000, whichever is greater, without advance approval of the Dinwiddie County School Board.

Budget Holders are authorized to sign the following contracts within their delegated purchasing authority; Interscholastic Athletic Contest, Institutional Membership Applications, and Sports Officials. Budget Holders do not have the authority to sign vendor contracts and agreements except as specified.

RECEIPT OF GOODS/SERVICES AND PAYMENT OF INVOICES

Upon execution of a Contract or Purchase Order, the Budget Holder or his/her designee shall oversee the product receipt or service completion.

Upon receipt of goods/services, department shall verify that all goods/services were received and in good condition. If anything is missing, damaged, incomplete or not satisfactory to the purchaser, vendor should be contacted immediately.

The budget holder shall review invoices; sign off once item(s) is/are received in satisfactory condition. Submit invoice(s) with the pink copy of the purchase order to Accounts Payable for payment. If the purchase order is still open, please submit the invoice with a Partial Payment Authorization form so payment can be processed. Accounts Payable shall pay vendors following submittal of approved invoice.

Accounts Payable will be processing checks on the 5th, 15th and 25th of each month. Dinwiddie County Public Schools terms are Net 30.

SOLE SOURCE PROCUREMENT

When the budget holder determines that only one source exists for a good or service with an estimated dollar value greater than \$5,000.00, a signed statement to that effect, supported by factual documentation, must be submitted to the purchasing agent before you agree to any

purchase. Reasonable efforts should be made to obtain other quotes on substantially similar goods or services prior to making a determination. Once the purchasing agent has determined the sole source determination is in compliance you will be notified to proceed with the purchase order.

The Sole Source Provider Determination Form must be completed for all sole source procurement requests. A copy of all sole source provider determination forms will be kept in the purchasing office. A copy of the form is attached and is on our website (www.dinwiddie.k12.va.us.) Quick Links-Staff Intranet-Staff Resources-Forms-Employee Finance Forms-Purchasing.

A notice of intent to award sole source procurement with a total cost in excess of \$100,000.00 shall be publicly posted for ten (10) calendar days prior to the date of the actual award. Anything over \$200,000.00 will require a sealed bid.

EMERGENCY PROCUREMENT PROCEDURES

An emergency may arise in order to protect personal safety, life or property, or provide continuation of required services. In such cases, an award can be made without competitive bidding or competitive negotiation. A written determination and justification shall be required from the budget holder and approved by the superintendent or designee.

An Emergency Procurement Determination Form must be completed for all emergency procurement requests. It should be attached with the purchase order and sent to the purchasing agent for approval. A copy of all emergency procurement requests will be kept in the purchasing office. A copy of the form is attached and is on our website (www.dinwiddie.k12.va.us.) Quick Links-Staff Intranet-Staff Resources-Forms-Employee Finance Forms-Purchasing.

For Emergency purchases which exceed \$200,000.00, a written notice must be publicly posted for ten (10) calendar days, starting on the day the award is announced. The potential loss of year end funds is not considered an adequate justification and will not be approved as such.

COOPERATIVE PROCUREMENT

The superintendent is authorized by the school board to participate in, sponsor, conduct or administer a cooperative procurement agreement with one or more other public bodies for the purpose of combining requirements to increase efficiency or reduce administrative expenses.

A Cooperative Procurement Checklist must be completed for all cooperative procurement requests. This checklist along with supporting documentation (a copy of the RFP and contract of requested purchase) must be sent to the purchasing agent before you agree to any purchase. Once the purchasing agent has determined the cooperative agreement is in compliance you will be notified to proceed with the purchase order. A copy of all cooperative procurement requests will be kept in the purchasing office. A copy of the form is attached and is on our website (www.dinwiddie.k12.va.us.) Quick Links-Staff Intranet-Staff Resources-Forms-Employee Finance Forms-Purchasing.

VENDOR RELATIONS (DJG)

No vendor, agent, or sales representative enters the schools to advertise or sell goods or services to employees or students unless otherwise provided herein. Any person/persons found soliciting goods or services to students and employees in the schools or on school property during school hours is subject to legal action.

Vendors will not be permitted to make appointments with individual School Board employees without the permission of the principal, the superintendent, or the superintendent's designee. No vendor will be permitted to arrange demonstrations of products or services, take orders for goods or services to be used for a trial period, or take orders to be billed to the school or school division without prior authorization from the superintendent or the superintendent's designee.

This does not prevent authorized representatives of firms regularly supplying goods and services to the school division from having access to the schools in the course of their routine business duties.

PROCUREMENT MATRIX

AMOUNT (\$)	TYPE	PROCESS FOR QUOTES	NO OF VENDORS SOLICITED	DECISION CRITERIA	PO REQUIRED	CONTRACT REQUIRED	SCHOOL BOARD APPROVAL	NOTES
0.01-2,500 00	GOODS/NON-PROFESSIONAL SERVICES	ORAL OR WRITTEN	1	BEST PRICE	X			USE BOA CARD IF POSSIBLE
0.01-4,999 99	GOODS/NON-PROFESSIONAL SERVICES	ORAL OR WRITTEN	1	LOWEST RESPONSIVE AND RESPONSIBLE VENDOR OR BEST VALUE	X			USE BOA CARD IF POSSIBLE
5,000 00-199,999.99	GOODS/NON-PROFESSIONAL SERVICES	ORAL OR WRITTEN. Written is preferred	3	LOWEST RESPONSIVE AND RESPONSIBLE VENDOR OR BEST VALUE	X			SB IS NOTIFIED OF ALL PURCHASES OVER \$100,000 00
200,000.00+	GOODS/NON-PROFESSIONAL SERVICES	IFB OR RFP	N/A	LOWEST RESPONSIVE AND RESPONSIBLE BIDDER OR BEST VALUE	X	X	X	POSTED IN eVA

0 01-4,999 99	PROFESSIONAL SERVICES	WRITTEN	1	BEST VALUE	X	X		
5,000 00-79,999.99	PROFESSIONAL SERVICES		3	COMPETITIVE NEGOTIATION BASED ON CRITERIA	X	X	X	
80,000 00+	PROFESSIONAL SERVICES		N/A	COMPETITIVE NEGOTIATION BASED ON CRITERIA	X	X	X	

PURCHASING PARTNERS

These Pre-Authorized Online Vendors have been set up as Tax Exempt. All online purchases must follow the Dinwiddie County Public Schools Procurement Policies & Procedures. While all may window shop, only authorized staff may submit and pay for orders from these sites. Please use your Bank of America Purchasing Card whenever possible.

Amazon Business: Amazon Business Prime with free 2-day shipping on most items. Teachers and other staff will only be allowed to shop and add items into their shopping cart. The bookkeeper and/or other authorized staff will review their selections and place the order if it has been approved by the Principal. Please contact purchasing agent if you have any problems. amazon.com

E Virginia (eVA): Web-based e-Procurement tool that opens the door to continuous money saving opportunities. Here you can view all Statewide Contracts. You can also obtain “Quick Quotes” for just about anything you may need. Please contact the purchasing agent if you or your designee need help navigating the eVA website. You can access the site at eva.virginia.gov/.

Office Depot Business: Online ordering system. Users were sent the account number and an access link. If you have trouble getting into the site please contact the purchasing agent for help. Please use this website versus using *Office Depot.com*. You will not get the business partner pricing on the regular site. business.officedepot.com

Samsclub.com: Staff may turn in their pre-approved order to their school bookkeeper or other authorized staff member who will process the orders. samsclub.syf.com

School Specialty: On-line ordering system. Limited access at this time. schoolspecialty.com

Staples Business Advantage: Online ordering system. Users were sent the account number and an access link. If you have trouble getting into the site please contact the purchasing agent for help. Please use this website versus using *Staples.com*. You will not get the business partner pricing on their regular site. staplesadvantage.com/

The Supply Room: View their product site at c-lineproducts.com . Please contact the purchasing agent if you wish to order from this site in order to get the account number and sign on credentials.

W.B. Mason: This vendor can supply everything you need from coffee to a new desk chair. You can visit their site at wbmason.com. Please contact the purchasing agent if you wish to order from this site in order to get the account number and sign on credentials.

Walmart.com: This is a corporate account with limited access. Staff may turn in their pre-approved order to their school bookkeeper or other authorized staff member who will process the orders. DO NOT order any APPLE products from Walmart.com. (Their contract with APPLE states that any product from APPLE is considered for personal use and not subject to a refund for sales tax) You may only use your VISA purchasing card. Walmart.com does not accept the Store Walmart card. walmart.com

PURCHASING COOPERATIVES

A purchasing cooperative (or co-op) is when two or more government entities join together in order to purchase goods and services to receive more advantageous pricing and efficiencies in procurement. A cooperative undertakes the competitive procurement process for its members and obtains contracts for goods and services. This eliminates the need for quotes and bids.

If you are looking for a particular item or are having trouble getting quotes, please contact the purchasing agent for help. Together we should be able to find what you need with one of our cooperatives.

Buy Board National Purchasing Cooperative - Athletic, Audio Visual Equipment, Carpet, furniture and many other items. You can visit their website buyboard.com

E&I Cooperative Services: This is a leading not-for-profit buying cooperative focused exclusively on education. Some of the companies included in this group as Lowes, O'Reilly's, FedEx Corporation, Ferguson Enterprises, Sherwin Williams, Staples Business Advantage and many other. Website is eandi.org

Omnia Partners: Includes companies that were previously part of National IPA and U.S. Communities. Contracts include BSN Sports, Lowes Pro Service, Toro, W.W. Grainger, and many others. Their contracts are constantly being updated. Their website is omniapartners.com

PACE: Includes CDW-G, Follett, Lakeshore Learning, Scholastic, Rainbow Books, Wayfair, Lennox and many others. When you visit their website you may see companies you already deal with. Get with the purchasing agent to see if we can get a better price using these contracts. Website is pacecoop.org

PEPPM: This is a National Cooperative for Technology products. Their contracts include Audio-Visual Products; Genera Hardware and Software; Refurbished Computer Systems and Parts and Remanufactured Laser Toner and Ink Cartridges. Their website is peppm.org

Sourcewell: Includes companies that were previously part of National Joint Purchasing Alliance (NJPA) Contracts includes Gordian, Grainer-Facilities Maintenance, CDW Government LLC and many others. Their contracts are constantly being updated. Their website is sourcewell-mn.gov

TIPS: Includes companies such as Follett School Solutions, Frog Publications, Lakeshore Learning Materials and many others. All you do is access the site and search "All Contracts" or "All Vendors" to locate a specific vendor, service, or product. Please remember to always check the contract dates. Once you find what you need contact the purchasing agent to complete the purchase. Their website is tips-usa.com

ATTACHMENTS

The following forms have been attached for your convenience.

- W-9 Form
- Sales and Use Tax Certificate of Exemption
- Cooperative Procurement Checklist
- Emergency Procurement Determination Form
- Sole Source Determination Form
- Telephone Bid / Quote Form
- Partial Payment Authorization
- Request for Payment
- Policy DJA
- Policy DJ
- Policy DJ-R
- Policy DJF
- Policy DJG

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3	<p>1 Name (as shown on your income tax return). Name is required on this line, do not leave this line blank</p>	
	<p>2 Business name/disregarded entity name, if different from above</p>	
	<p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____ </p>	<p>4 Exemptions (codes apply only to certain entities, not individuals, see instructions on page 3)</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions</p>	<p>Requester's name and address (optional)</p>
	<p>6 City, state, and ZIP code</p>	
	<p>7 List account number(s) here (optional)</p>	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
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or								
Employer identification number								
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-								

Part II Certification

Under penalties of perjury, I certify that

- 1 The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- 2 I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below), and
- 4 The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ _____	Date ▶ _____
------------------	----------------------------------	--------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes	Limited liability company and enter the appropriate tax classification (P= Partnership; C= C corporation, or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form

3. Real estate transactions. You must sign the certification You may cross out item 2 of the certification

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations)

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABL accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2 Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3 Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4 Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5 a The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6 Sole proprietorship or disregarded entity owned by an individual	The owner ³
7 Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴

For this type of account:	Give name and EIN of:
8 Disregarded entity not owned by an individual	The owner
9 A valid trust, estate, or pension trust	Legal entity ⁴
10 Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11 Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12 Partnership or multi-member LLC	The partnership
13 A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14 Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15 Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title) Also see *Special rules for partnerships*, earlier

*Note: The grantor also must provide a Form W-9 to trustee of trust

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039

For more information, see Pub. 5027, *Identity Theft Information for Taxpayers*.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

COMMONWEALTH OF VIRGINIA
SALES AND USE TAX CERTIFICATE OF EXEMPTION

For use by the Commonwealth of Virginia, a political subdivision
of the Commonwealth of Virginia, or the United States

To: _____ Date: _____
Name of Dealer

Number and Street or Rural Route City, Town, or Post Office State ZIP Code

The Virginia Retail Sales and Use Tax Act provides that the Virginia sales and use tax shall not apply to tangible personal
property for use or consumption by this State, any political subdivision of this State, or the United States. This exemption does
not apply to sales or leases to privately owned financial and other privately owned corporations chartered by the United States.

The undersigned, for and on behalf of the governmental agency named below, hereby certifies that all tangible personal
property purchased or leased from the above dealer on and after this date will be for use or consumption by a governmental
agency, that each such purchase or lease will be supported by the required official purchase order, and that such tangible
personal property will be paid for out of public funds. Check the appropriate box below.

- 1. Tangible personal property for use or consumption by the Commonwealth of Virginia, including prepared meals,
catering, and other services related to the provision of food.
2. Tangible personal property for use or consumption by a political subdivision of the Commonwealth of Virginia,
including prepared meals, catering, and other services related to the provision of food.
3. Tangible personal property and taxable services for use or consumption by the United States.

Dinwiddie County School Board Federal ID 54-6001255
Name of Governmental Agency
14016 Boydton Plank Road / P.O. Box 7 Dinwiddie VA 23841
Number and Street or Rural Route City, Town, or Post Office State ZIP Code

I certify I am authorized to sign this Certificate of Exemption and that, to the best of my knowledge and belief, it is true and
correct, made in good faith, pursuant to the Virginia Retail Sales and Use Tax Act.

By: Brenda Austin Finance Manager, Purchasing Agent
Signature Title

Information for dealer: A dealer is required to have on file only one Certificate of Exemption, properly executed by the
governmental agency buying or leasing tax exempt tangible personal property under this Certificate.



DINWIDDIE COUNTY PUBLIC SCHOOLS COOPERATIVE PROCUREMENT CHECKLIST

Goods/Services Requested: _____

Purpose of Requested Goods/Services: _____

Vendor Info

Company Name: _____ Phone: _____

Company Contact: _____ Email: _____

Address: _____

Original Contract was procured by: _____ (State/Agency/Locality)

Agency Contact: _____

Date of Original Contract: _____

Expiration of Contract/Renewal: _____

- Does the contract or solicitation include cooperative procurement language allowing other entities to use the contract?
- Have you read and understand all terms and conditions of the original solicitation, contract, and quote?
- Do the prices on the quote match those listed in the contract?
- Is the quoted price fair and reasonable?
- Have you researched any other vendors that provide the same good/service?
- Original contract plus any renewals or amendments attached.
- Original solicitation (IFB or RFP) attached.

Additional Information:

Completed By:

Printed Name: _____ Signature: _____

This checklist must be completed and sent to the purchasing agent along with supporting documentation before you agree to any purchase. Once the purchasing agent has determined the cooperative agreement is in compliance you will be notified to proceed with the purchase order. A copy of this checklist will be kept in the purchasing office.



DINWIDDIE COUNTY PUBLIC SCHOOLS EMERGENCY PROCUREMENT DETERMINATION FORM

Date Awarded: _____

Vendor info

Company Name: _____ Phone: _____

Address: _____

Description of goods or services:

The reason for the selection of this particular Vendor is:

This emergency procurement determination is based on the following:

From our investigation, it was determined that the price is fair and reasonable in this particular emergency situation.

Director

Date

Purchasing Agent/Authorized Designee

Date

This written determination must be completed for all emergency procurement requests. Attach with the purchase order and send to the Purchasing Agent for approval. A copy of all emergency procurement requests will be kept in the purchasing office.



DINWIDDIE COUNTY PUBLIC SCHOOLS SOLE SOURCE DETERMINATION FORM

Date Awarded: _____

Vendor info

Company Name: _____ Phone: _____

Address: _____

Description of goods or non-professional services:

This Sole Source Determination is based on the following. *Check the applicable justification.*

- There is only one manufacturer/provider AND this is the only known item or source that will meet the specialized needs of the department or perform the intended function.
- The item is not interchangeable with similar parts of another manufacturer OR the parts/equipment are required from this source to permit standardization.
- Other, describe in detail.

From our investigation, we have determined that there is only one source that is practicably available to procure the listed goods or non-professional services and the quoted price is fair and reasonable.

Director

Date

Purchasing Agent/Authorized Designee

Date

This checklist must be completed and sent to the purchasing agent before you agree to any purchase. Once the purchasing agent has determined the sole source documentation is in compliance you will be notified to proceed with the purchase order. A copy of this sole source determination form will be kept in the purchasing office.



DINWIDDIE COUNTY PUBLIC SCHOOLS TELEPHONE BID / QUOTE FORM

Item Requested: _____

Additional Information: _____

QUOTE #1

Vendor _____

Date Phone Number _____

Vendor Representative _____

Amount \$ _____

Additional Information: _____

QUOTE #2

Vendor _____

Date Phone Number _____

Vendor Representative _____

Amount \$ _____

Additional Information: _____

QUOTE #3

Vendor _____

Date Phone Number _____

Vendor Representative _____

Amount \$ _____

Additional Information: _____

Purchase Dollar Thresholds:

1. Total estimated cost less than \$5,000.00 – only one (1) telephonic or written bid required
2. Total estimated cost \$5,000.01 - \$199,999.99 minimum of three (3) telephonic or written bids are required.
3. Total estimated cost that is expected to exceed \$ 200,000.00 must be discussed with the Purchasing Agent since they require a written formal solicitation.



FINANCE DEPARTMENT

PARTIAL PAYMENT AUTHORIZATION

Date: _____

Vendor: _____

PO# _____ Original Amount: _____

Please Pay this amount: _____

Charge to Account# _____

Approved By: _____
(SIGNATURE)

THIS SHOULD BE PRINTED ON PINK PAPER

(Submit this form with all invoices prior to the final payment.)
(Attach pink copy of Purchase Order to final Payment.)



FINANCE DEPARTMENT

REQUEST FOR PAYMENT

Date: _____

Check Payable To:

Name _____

Address _____

City/State _____

Zip
Code _____

Reason for Payment: _____

Check in the Amount _____

\$ _____

Requested By: _____

(Signature)

Check Payable By:

Accounts
Payable

Payroll

Request Approved By: _____

Payment Coded To: _____



Book	Dinwiddie County School Board Policies
Section	D - Fiscal Management
Title	PURCHASING AUTHORITY
Code	DJA
Status	Active
Adopted	October 13, 2020

The superintendent may designate a qualified employee to serve as the purchasing agent for the Board. In this capacity, the agent for the Board may purchase or contract for all supplies, materials, equipment, and contractual services required by the school division subject to federal and state laws and regulations and School Board policies. All contracts shall be signed by the authorized designee or School Board Clerk.

Internal Controls

The superintendent, or superintendent's designee, establishes appropriate procedures for internal accounting controls.

Purchasing and Contracting

Dinwiddie County School Board encourages full and open competition whenever practicable among potential contractors and suppliers by competitive bidding practices; to centralize purchasing and contracting within the school division to realize the economies resulting therefrom; and to seek maximum educational value for every dollar expended.

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Legal Code of Virginia, 1950, as amended, §§ 2.2-4300 et seq., 22.1-70 and 22.1-78.

Cross References DJ - SMALL PURCHASING
DJF - PURCHASING PROCEDURES



Book	Dinwiddie County School Board Policies
Section	D - Fiscal Management
Title	SMALL PURCHASING
Code	DJ
Status	Active

Pursuant to written procedures not requiring competitive sealed bids or competitive negotiation, the School Board may enter into single or term contracts for goods and services other than professional services and non-transportation related construction if the aggregated or the sum of all phases is not expected to exceed \$200,000 and transportation-related construction if the aggregate or sum of all phases is not expected to exceed \$25,000. However, such small purchase procedures shall provide for competition wherever practicable. Such small purchase procedures may allow for single or term contracts for professional services without requiring competitive negotiation, provided the aggregate or the sum of all phases is not expected to exceed \$80,000. Where small purchase procedures are adopted for construction, the procedures shall not waive compliance with the Uniform State Building Code.

Tax Exempt - Dinwiddie County Public Schools are exempt from sales tax for goods/services purchased in or delivered to Virginia; however, retail sales of prepared meals, charges for lodging and purchases of goods in other states are subject to sales tax. All staff making purchases on behalf of Dinwiddie County Public Schools, no matter the dollar amount, are responsible for enduring that no taxes are added to tax exempt purchases. If taxes are added to an exempt purchase, the employee who made the purchase is responsible for seeing that taxes are removed or credit received. Failure to remove taxes could result in the employee personally paying for taxes on that purchase. Tax exempt forms are available from the Procurement Office.

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Legal	Code of Virginia, 1950, as amended, Sections 2.2-4303, 22-1-68, 22.1-78
Cross References	DJF - PURCHASING PROCEDURES



Book	Dinwiddie County School Board Policies
Section	D - Fiscal Management
Title	PURCHASING PROCEDURES - Regulations
Code	DJ-R
Status	Active
Adopted	October 13, 2020

Background

All purchases shall be in compliance with the Virginia Public Procurement Act and Dinwiddie County School Board policies and regulations.

Procurement Authority and Responsibility

The school board delegates authority to the superintendent and purchasing agent to enter into contracts for the procurement of goods and services for amounts not to exceed \$200,000. The school board shall specifically authorize all contract awards that exceed this amount. The superintendent is authorized by the school board to delegate purchasing authority to budget holders of particular schools and departments for the purchase of specified goods and/or services.

Delegated Authority to Sign Purchase Orders

The superintendent delegates the authority to all budget holders to sign purchase orders up to \$2,500 for the procurement of goods and services. This delegated authority will not apply to signing contracts or agreements except as specified in section 2.A.3 below. When exercising this delegated authority, the budget holder signs as "Authorized Purchasing Official" and certifies that goods and/or services are budgeted, appropriate and necessary. Failure to comply with procurement policies, regulations and procedures may result in reduction or loss of the budget holder's delegated authority.

Procurement Methods

The following methods used for the purchase of all goods and services are outlined herein: Small Purchases, Competitive Sealed Bidding, Competitive Negotiation, Sole Source, and Emergency.

Small Purchases

Purchases where the estimated cost of the materials, equipment, supplies and/or non-professional services is less than \$200,000 shall be handled as follows:

1. Goods

A. Purchase Dollar Thresholds

1. Total estimated cost less than \$5,000 (0 - 4,999.99), only one telephonic or written bid required.

- 2 Total estimated cost \$5,000.01 - \$199,999.99, minimum of three telephonic or written bids are required.
3. Purchases in excess of \$100,000 will be reported to the School Board at the next meeting for informational purpose only.

2. Non-professional Services

Examples of non-professional services include transportation, charter bus service, disc jockeys, athletic officials, yearbooks, photography services, etc.

A. Purchase Dollar Thresholds

1. Total estimated cost less than \$5,000 (0 - 4,999.99), only one telephonic or written bid required.
2. Total estimated cost \$5,000 - \$199,999.99, minimum of three telephonic or written bids are required.
3. The Dinwiddie County School Board authorizes its public schools to enter into contracts to provide caps and gowns, photographs, class rings, yearbooks and graduation announcements for purchase or rental by students, parents, faculty or other persons using non-public money through the use of competitive negotiations.

3. Individual Services

Although annual contracts with firms or individuals which provide such services are encouraged, when it is determined in writing by the budget holder, and approved in advance by the purchasing agent, that it is not practical to obtain such services through competitive unsealed or sealed bidding, the following alternative methods may be used:

- A. The budget holder, in conjunction with the purchasing agent, may establish, in advance, the contractual terms and hourly rates it will pay for the service. These rates should not exceed the base salary of comparable positions in the state and local government, and must be reviewed on an annual basis.
- B. The budget holder may maintain current list of qualified personnel who agree to be available on short notice to fill requirements and who agree to perform at predetermined rates.
- C. The first time an individual provides the service they will be issued a DCPS contract by the finance department. The contract will remain in force until the rates are changed, the need expires or for a period of one year, whichever is greater. These individuals perform as independent contractors and are therefore responsible for their own taxes and accrue no benefits for DCPS.

Competitive Sealed Bidding

Purchases where the estimated total cost of materials, equipment, supplies, and/or non-professional services exceeds \$200,000 shall be made through the purchasing agent through advertised sealed competitive bidding; i.e., the issuance of an Invitation For Bid, "IFB." The purchasing department will advertise the Invitation For Bid (IFB) on the Virginia electronic procurement website (eVA), the school division website (www.dinwiddie.k12.va.us) and *may* publish in a newspaper of general circulation at least ten (10) days prior to the date set for the receipt of bids. The IFB will also be posted in a designated public area for an equivalent period of time. Additionally, the purchasing agent will solicit sealed competitive bids from a minimum of three (3) qualified sources.

Competitive Negotiation

This procedure is only to be used for the procurement of professional services, when it is impractical or impossible to accurately describe the desired services and when the estimated cost is to exceed \$80,000.

Upon determination that competitive negotiation is the most appropriate method by which to award the bid, the purchasing agent will issue a Request For Proposal, "RFP." The purchasing department will advertise the Request For Proposal (RFP) on the Virginia electronic procurement website (eVA), the school division website (www.dinwiddle,k12,va.us) and *may* publish in a newspaper of general circulation at least ten (10) days prior to the date set for the receipt of bids. The RFP will also be posted in a designated public area for an equivalent period of time. Additionally, the purchasing agent will solicit sealed competitive proposals from a minimum of three (3) qualified sources.

The purchasing agent shall form a committee to objectively evaluate each proposal received. The committee shall engage in individual discussions with two or more offerors deemed fully qualified, responsible, and suitable on the basis of initial responses and with emphasis on professional competence to provide the required services.

At the conclusion of this discussion, based on evaluation factors published in the RFP and all information developed in the selection process to that point, the committee shall select in order of preference two or more offerors. Negotiations will then be conducted, beginning with the offeror ranked first. If a contract satisfactory and advantageous to DCPS can be reached, then an award can be made to that offeror. Otherwise, negotiations with that offeror will be formally terminated and negotiations with the offeror ranked next can proceed.

Professional Services

The budget holder shall always contact the purchasing agent to establish professional service contracts. In accordance with the code of Virginia, professional services are strictly limited to the following:

1. Accounting Services
2. Actuarial Services
3. Architectural Services
4. Land Survey Services
5. Legal Services
6. Engineering Services
7. Medicine, Optometry and Pharmacy Services

Sole Source Purchase

When the budget holder determines that only one source exists for a good or service with an estimated dollar value greater than \$5,000, a signed statement to that effect, supported by factual documentation, must be submitted to the purchasing agent along with the purchase order.

A notice of intent to award a sole source procurement with a total cost in excess of \$200,000 shall be publicly posted for ten calendar days prior to the date of the actual award.

Emergency Purchase

An emergency may arise in order to protect personal safety, life or property, or provide continuation of required services. In such cases, an award can be made without competitive bidding or competitive negotiation. A written determination and justification shall be required from the budget holder and approved by the superintendent or designee. For emergency purchases which exceed \$200,000, a written notice must be publicly posted for ten calendar days, starting on the day of the award is announced. The potential loss of year-end funds is not considered an adequate justification and will not be approved as such.

Contracts

Budget holders are authorized to sign the following contracts within their delegated purchasing authority: Interscholastic Athletic Contest, Institutional Membership Applications, and Sports Officials. Budget holders do not have further delegated authorization and will not be approved as such. Budget holders do not have the authority to sign vendor contracts and agreements except as specified in Non-Professional Services 2.A.3.

Cooperative Procurement

The superintendent is authorized by the school board to participate in, sponsor, conduct or administer a cooperative procurement agreement with one or more other public bodies for the purpose of combining requirements to increase efficiency or reduce administrative expenses.

Bid Awards

In cases where competitive bidding has been required, purchase awards will go to the lowest responsible and responsive bidder.

Procedure Where Competitive Sealed Bids Exceed Available Funds

The school board has reserved the right to negotiate with the apparent low bidder as follows when the competitive sealed bids exceed the available funds:

1. If competitive bids exceed available funds, the superintendent shall inform the school board and the school board will determine whether to authorize negotiation with the apparent low bidder or re-solicit bids.
2. If the school board determines to negotiate with the apparent low bidder, notification will be given to the apparent low bidder together with suggested amendments.
3. Negotiations will be conducted by the superintendent, or person designated by the superintendent, and may include repetitive informal meetings and discussions between the apparent low bidder and school board personnel and consultants.
4. If the proposed addendum is within available funds, the school board may either award the contract based upon the amended proposal or reject all bids and re-solicit bids for the purchase. If the apparent low bidder is unable or unwilling to submit or negotiate an amended proposal within available funds, the school board, upon being so advised by the superintendent, shall reject all bids.

Legal

Small Business Act, section 8a, as amended, 15 U.S.C. 637(a) Code of Virginia, 1950, as amended, Sections 22.1-141, 2.1-177 Virginia Public Procurement Act, Section 11-34 et seq. Attorneys General opinions from 1985-86 / Report of the attorney General, pages 45-47, and 1984-85 Report of the Attorney General, pages 435-436

[Cooperative Procurement Checklist Fillable 2.pdf \(54 KB\)](#)

[Emergency Procurement Form Fillable \(1\).pdf \(254 KB\)](#)



Book	Dinwiddie County School Board Policies
Section	D - Fiscal Management
Title	PURCHASING PROCEDURES
Code	DJF
Status	Active

All procurements made by the school division are in accordance with the Virginia Public Procurement Act and the applicable Dinwiddie County School Board regulations.

Award of Contracts When Individuals Who Will Provide Services Have Been Convicted of Certain Crimes

The School Board will not award a contract for the provision of services that require the contractor or employees of the contractor to have direct contact with students on school property during regular school hours or during school-sponsored activities when any individual who provides such services has been convicted of any violent felony set forth in the definition of barrier crime in subsection A of Va. Code § 19.2-392.02 or any offense involving the sexual molestation, physical or sexual abuse, or rape of a child.

The School Board may award a contract for the provision of services that require the contractor or employees of the contractor to have direct contact with students on school property during regular school hours or during school-sponsored activities when any individual who provides such services has been convicted of any felony or crime of moral turpitude that is not set forth in the definition of barrier crime in subsection A of Va. Code § 19.2-392.02 and does not involve the sexual molestation, physical or sexual abuse, or rape of a child, provided that in the case of a felony conviction, the Governor has restored the individual's civil rights.

Unauthorized Aliens

The School Board provides in every written contract that by submitting their Bids/Proposals, bidders/offerors certify that they do not and will not during the performance of this contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.

Discrimination by Contractor Prohibited

The School Board includes the following provisions in every contract of more than \$10,000:

1. During the performance of this contract, the contractor agrees as follow:

- The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, status as a service disabled veteran, or other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
- The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
- Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements.

2. The contractor will include the provisions of #1. Above in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

Drug and Alcohol-Free Workplace

During the performance of this contract, the contractor agrees to (i) provide a drug and alcohol-free workplace for the Contractor's/Vendor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance, marijuana or alcohol is prohibited in the Contractor's/Vendor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor/Vendor that the Contractor/Vendor maintains a drug and alcohol-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug & alcohol-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a Contractor/Vendor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract (Code of Virginia §2.2-4312).

Legal Small Business Act, section 8a, as amended, 15 U.S.C. 637(a); Code of Virginia, 1950, as amended, §§ 2.2-4300 et seq., 22.1-296.1. sections 22.1-141, 2.1-177; Virginia Public Procurement Act, section 11-35 et seq.

Cross References GCDA - EFFECT OF CRIMINAL CONVICTION OR FOUNDED COMPLAINT OF CHILD ABUSE OR NEGLECT
IGBGA - ONLINE COURSES AND VIRTUAL SCHOOL PROGRAMS
KN - SEX OFFENDER REGISTRY NOTIFICATION



Book	Dinwiddie County School Board Policies
Section	D - Fiscal Management
Title	VENDOR RELATIONS
Code	DJG
Status	Active
Adopted	November 14, 2017

No vendor, agent, or sales representative enters the schools to advertise or sell goods or services to employees or students unless otherwise provided herein. Any person/persons found soliciting goods or services to students and employees in the schools or on school property during school hours is subject to legal action.

Vendors will not be permitted to make appointments with individual School Board employees without the permission of the principal, the superintendent, or the superintendent's designee. No vendor will be permitted to arrange demonstrations of products or services, take orders for goods or services to be used for a trial period, or take orders to be billed to the school or school division without prior authorization from the superintendent or the superintendent's designee.

This does not prevent authorized representatives of firms regularly supplying goods and services to the school division from having access to the schools in the course of their routine business duties.

Legal	Code of Virginia, 1950, as amended, §§ 2.2-4370, 2.2-4371, 22.1-78, 22.1-293(B, D) 22.1-293
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Cross References	GAH - SCHOOL EMPLOYEE CONFLICT OF INTERESTS KKA - SERVICE ANIMALS IN PUBLIC SCHOOLS
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