



ARCADIA

Unified School District

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# **Purchasing Manual**

## **Policy, Regulations, and Procedures**

**ARCADIA UNIFIED SCHOOL DISTRICT**

**Purchasing Policy, Regulations, and Procedures**

As a Local Education Agency (LEA), under Administrative Services, the Purchasing Department is dedicated to providing our Administration and Schools with the highest level of customer service. Our goal is to facilitate the acquisition of the best quality goods and services for the best value to the District, at the most competitive price, while adhering to Local, State, and Federal guidelines, codes, and regulations. Other functions include, but not limited to, preparing bids and requests for proposals, maintaining vendor information, fixed assets management, and records management.

**SECTION I – GENERAL PURCHASING PROCEDURES**

**1. PURCHASING AND BOARD RELATIONSHIPS**

These purchasing policies and regulations are published in compliance with Section 54202 and 54204 of the Government Code of California. The guiding purpose of the Board of Education in establishing them is to purchase without prejudice, seeking to secure quality product and maximum value for every dollar expended.

The purchasing of services, equipment, and supplies is centralized in the Purchasing Department under the immediate direction of the Purchasing Manager, with the mechanical function of procurement being delegated to the department by the Board. However, under the law, the Board has the sole authority and responsibility for all purchase contracts of the District, and this authority and responsibility cannot be delegated. The Purchasing Manager shall directly report to the Chief Business Officer.

It shall be the duty of the Purchasing Manager to comply with all provisions of the California Education Code, California Government Code, and Board policy. Purchasing functions shall be carried out in the simplest and most efficient manner, consistent with service to the District and sound business practice. The Board shall designate District officials who shall be authorized to sign purchase orders and other purchase or contractual obligations of the District. The Purchasing Department shall submit twice a month to the Board of Education for approval of a listing of each purchase order written.

**2. PURCHASING AND STAFF RELATIONSHIPS**

All requests for prices, repair service, and all purchases shall be made by the Purchasing Department. All communications with vendors should be through the Purchasing Department except in special cases where the technical details make it advisable to delegate authority to others.

In discussions with vendors, school district employees should be reminded that only the Purchasing Manager has authority to commit District funds for the purchase of supplies, equipment, and services. Purchases made in the name of the District without an authorized purchase order shall be considered an obligation of the person making the purchase and not an obligation of the District.

Purchasing from District employees or their immediate family, for any material purchases, is not permitted as it can be construed as a conflict of interest. The Purchasing Department shall strive constantly to increase its knowledge of new equipment, materials, services, sources, prices and processes in manufacturing. The Purchasing Department shall seek competent counsel from its colleagues regarding matters of common interest.

### 3. PURCHASING AND VENDOR RELATIONSHIPS

District staff shall adhere and fully comply with Codes of Ethics Board Policies 4119.21 and 4219.21. Opportunity shall be provided to responsible vendors to do business with the District. Vendor visits shall be promptly acknowledged and interviews granted or not, depending on the circumstances. Purchasing personnel are not required to put their time absolutely and indiscriminately at the disposal of any salespersons, however frequent, or on whatever mission they may be calling. The responsible Purchasing personnel must be the judge, but they are not relieved from the obligation of courtesy.

The Purchasing Department shall not extend favoritism to any vendors. Each order shall be placed on the basis of quality, price, and delivery, with past services being a factor if all other considerations are equal. The Purchasing Department and Nutrition Services Department, shall not solicit funds or materials from vendors for personal gain.

### 4. PLANNING AND REQUISITIONS PREPARATION

All requests for supplies, equipment, conferences, invoices, and warehouse stock items shall originate with the principal or department head and shall be submitted through the District financial system for online approvals.

It shall be the responsibility of the Chief Business Officer to determine whether or not a requisition is in accordance with the Board of Education policy and budget allocation.

### 5. CONFERENCE/PROFESSIONAL DEVELOPMENT ATTENDANCE REQUEST

The following guidelines shall be applicable to:

- Conference Attendance
- In-House Professional Development (School Site/District Sponsored)
- Site Based Collaboration, PLC, Data Analysis, Unit/Chapter Planning

- Planning Meetings/Leadership/Team Meetings
- Student Analysis Meetings

For additional information regarding the use of federal grant awards to pay for travel and professional development, please refer to the AUSD guidance document: AUSD Federally Funded Travel.

Procedures:

- A. All requests for travel and conference attendance must be authorized following district procedures.
  - a. All non-federally funded travel requests are required to utilize the district's electronic system for requesting and authorizing travel. Requests and authorizations are completed within the electronic system and must follow established procedures within the electronic system.
  - b. All federally funded travel requests are required to complete the Workshop/Conference Attendance Form rev 10/08 form #10-00091.
- B. Both non-federally funded and federally funded travel authorizations are routed through the purchasing department that reviews the request, all required documents and authorizations.
- C. The purchasing department determines if purchasing orders, substitutes, etc. are needed and the department creates reference numbers for actions in the electronic system.
- D. Required copies are provided to appropriate parties and the electronic system keeps records of the process and information.
- E. After travel has occurred, reimbursements are processed following district policies and procedures. (See accounts payable for more information) on the reimbursement process.)

## 6. TYPE OF REQUISITIONS

A. Warehouse Requisitions: Are entered by schools/departments using the District's system for acquisition of standard warehouse stock items.

B. Standard Requisitions are entered and submitted by schools/departments using the District's system for online approvals. These requisitions include but not limited to: equipment, capital outlay, travel expenses (hotel, airfare, car rental and etc.), conferences, professional and contracted services, field trips, workshops, assemblies, bids, RFPs, books, instructional materials and supplies, contracts, computer and related equipment or services, and audiovisual supplies and equipment.

C. Blanket Purchase Requisitions: Are entered and submitted by schools/departments using the District's system online approvals, amount not to exceed \$10,000, unless otherwise authorized by the Chief Business Officer.

A requisition form should include a minimum, but not limited to the following:

- A description of the item(s) to be purchased (The description should be complete enough for anyone to understand the item(s) being purchased)
- The quantity needed/requested
- The proposal number, if applicable
- A suggested vendor (Use the LEA's approved vendor list, making sure a bid vendor is used, if applicable)
- The code of the account to be charged (and account name if known);
- Pricing, if known
- Requests for requisitions for federal grant funds must include justification back-up from the Site SPSA/Needs Assessment/Improvement Plan, where applicable
- Proper original or electronic equivalent signatures, dated
- Board Date, if applicable
- Bid or RFP information, if applicable
- If using LCFF Supplemental and Concentration Grant, include LCAP Goal

## 7. TYPE OF PURCHASE ORDERS

A. Standard Purchase Order: Sourced from district accounting system upon completion of online approvals.

B. Blanket Purchase Order: Sourced from district accounting system upon completion of online approvals.

## 8. PURCHASING METHODS

A. Purchase Orders - When the total amount of an order does not exceed current bid limit (2026 bid limit \$119,100) for materials and equipment or \$15,000.00 (\$75,000 under CUPCCAA) for labor/repairs and construction work, the purchase order method shall be used.

B. Lease Purchase Agreements - A lease purchase-agreement shall be used whenever it is the intent of the District to purchase materials/equipment on a time basis rather than a cash basis (requires Board approval).

C. Lease/Rental Agreements - A lease rental agreement is used to rent property and/or equipment with no commitment by the District to purchase (requires Board approval).

D. Contract - On all items that exceed current bid limit (2026 bid limit \$119,100) for materials, supplies, services, and equipment, and \$15,000 (\$75,000 under CUPCCAA) for labor/repairs and construction work, a formal bid must be issued.

The following procedures, which would assure uniform action and conformance with all legal requirements, address the acquisition of supplies, equipment, and services or work to be done. Section A addresses the acquisition of materials and supplies. Section B covers services or work to be done. Each section covers monetary levels and what handling is required for each. For formal bids or Requests for Proposals, prospective bidders or distributors cannot participate in the development of specifications or any portion of the development of the bid and/or RFP's.

Section A: The purchasing of all materials, supplies, and services for the District must comply with all legal requirements of the State of California. The procedures for complying with these requirements are as follows:

Acquisition of Supplies and Equipment (Sales Tax Included)

1. \$ 1 - 5,000: May be made by issuing a purchase order
2. \$ 5,001 - 15,000: May be made by issuing a purchase order after obtaining at least two verbal/written quotations.
3. \$ 15,001 – Bid Threshold: May be made by issuing a purchase order after obtaining or researching at least three verbal/written quotations. The bid threshold is determined by Public Contract Code (PCC) Section 20111(a), which requires school district governing boards to competitively bid and award any contracts involving an expenditure of more than current bid limit, adjusted for inflation. For example, the bid threshold for calendar year 2026 is \$119,100.
4. Above Bid Threshold: May be made by issuing a purchase order after (a) legal advertisement (b) receipt of formal bids or RFP, and (c ) Board approval.

Section B: The section addressing “Services” not only reflects the lower bid limits but calls for the use of a “Contract” form, rather than a purchase order at three of the monetary levels. The change is due to the additional documents usually required when a service is performed. These documents are bonds, verification of Workers’ Compensation, Liability Insurance and Notices of Completion.

Acquisition of Services (Building Repairs/Construction/Public Works Projects)

1. \$ 1 - 5,000 May be made by issuing a purchase order with quotations – not normally solicited.
2. \$ 5,001 - 15,000 May be made by issuing a purchase order after obtaining at least three verbal/written quotations.

3. \$ 15,001 & up May be made by issuing a purchase order after (a) legal advertisement, (b) receipt of formal bids, and (c ) prior Board approval.

(Under CUPCAA, \$1-75,000 may be made by issuing a purchase order to CUPCAA vendors. \$75,001-220,000 by informal bid. \$220,001 and higher by formal bid)

## **SECTION II - STATE OF CALIFORNIA GENERAL GUIDELINES**

In conjunction and in addition to the procedures referenced above the following shall also apply:

### **9. FORMAL BID PROCEDURES**

Pursuant to Public Contract Code, Section 20111, the Board of Education shall approve Bids and award contracts involving an expenditure of more than \$15,000 for work to be done or more than \$119,100 (for 2026) for materials or supplies to be furnished, sold or leased to the District, to the lowest, responsive and responsible bidder who shall give such security as required, or Board of Education reserve the right to reject all bids. The award of an RFP/RFQ, if made by the District, will be based on the District's assessment and evaluation of qualifications, desirability, and etc. of the service provider.

Pursuant to Public Contract Code, Section 20118, the Board of Education may authorize the Purchasing Director to utilize competitive bids prepared by other school districts (commonly referred to as "piggyback") and public agencies, provided such authority is granted by the Board of Education and the originating agency at the time of the bid preparation and award of contract. These public agencies include any public corporation or agency, including any county, city, town or district; therefore, the piggyback contracts would also include but are not limited to the California Multi-State Cooperative Agreements such as NASPO (North American Security Products Organization - California), CMAS (California Multiple Awards Schedules); PEPPM National Program, National Intergovernmental Purchasing Alliance (NIPA), National Cooperative Purchasing Alliance (NCPA), National Joint Powers Alliance (NJPA), OMNIA, and The Cooperative Purchasing Network (TCPN).

Pursuant to Public Contract Code, Section 20112, the Board of Education, for the purpose of securing bids shall publish at least once a week for two weeks in a newspaper of general circulation, a notice calling for bids, stating the work to be done, materials or supplies to be furnished and the time and the place where the bids will be opened.

All advertised bids will be received only in the Purchasing Department, in a sealed envelope identified with the bid name/number prior to the date and time specified in the bid instructions. Bids received after the scheduled bid close will be returned unopened to the bidder.

Once the bids have been evaluated based on all the terms, availability, price, and specifications, a recommendation is provided to the Board of Education for their approval. If the Board grants approval, a formal contract will then be awarded to the approved vendor.

Bond and Security requirements: All bidders may be required to provide a Bid Bond with certain types of advertised bids. Successful bidders may, in addition, be required to furnish any or all of the following:

- a) 100% Performance Bond
- b) 100% Payment Bond (Labor and Materials)
- c) Public Liability Insurance Certificate
- d) Worker's compensation Certificate
- e) Completed W-9 Tax Form
- f) DIR Registration (when applicable)

### **SECTION III – FEDERAL GENERAL GUIDELINES**

In conjunction and in addition to the procedures referenced above the following shall also apply:

All procurement transactions, regardless of whether by sealed bids or by negotiations and without regard to dollar value shall be conducted in a manner that provides maximum open and free competition, Pursuant to Code of Federal Regulations, Section 200.319. Additionally, all costs incurred by the district must be determined to be necessary and cost-effective by the Chief Business Officer.

#### **10. PROCUREMENT PROCEDURES**

Code of Federal Regulations (CFR) 200.318 – General Procurement Standards, a non-Federal entity must use its own documented procurement procedures, which reflect State and local laws and regulations (When Federal and State Codes conflict, the more stringent of the two shall apply). See the previous section for District and State Guidelines.

When procuring goods, materials and contracting for services under a grant, all projects are subject to audit. Contracts must be competitively bid, if applicable and comply with Federal, State, and local procurement standards, pursuant to 44 CFR 13.36.

All procurement transactions, regardless of whether by sealed bids or by negotiation and without regard to dollar value shall be conducted in a manner that provides maximum open and free competition.

Non-Federal entities receiving funds through the Child Nutrition Programs may apply an optional geographical preference in the procurement of only unprocessed locally grown or locally raised agriculture products.

## 11. TYPE OF CONTRACTS

A. Lump sum: Contract for work within a prescribed boundary with a clearly defined scope and total price.

B. Unit price: Contract for work done on an item-by-item basis with cost determined on a unit basis.

C. Cost + fixed fee: Either a lump sum or unit price contract with a fixed contractor fee added into the price.

D. Time & materials: Should be avoided, but may be allowed for work necessary immediately after a disaster and after a determination that no other contract is suitable; include a cost ceiling or “not to exceed” provision [44CFR13. 36(b)(10)] .

## 12. METHODS OF PROCUREMENT AND BIDDING PROCEDURES

The following procedures which would assure uniform action and conformance with all legal requirements address the acquisition of supplies, equipment, and services or work to be done. For formal bids or Requests for Proposals, prospective bidders or distributors cannot participate in the development of specifications or any portion of the development of the bid and/or RFP's.

A. Micropurchase threshold \$15,000 (as of October 1, 2025). The aggregate value of a single transaction is \$50,000 or less, effective August 1, 2023

- Not to be used for regularly purchased items.
- Does not require multiple quotes if the pricing is deemed reasonable.
- Must be distributed equally among qualified suppliers.
- Prices must be reasonable.
- Requires retention of documents if quotes were obtained.

B. Small Purchases - Simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the simplified acquisition threshold, currently set at \$350,000, pursuant to Title 41 U.S.C. 403(11) as of 10/1/25. If small purchase procedures are used, price or rate quotations shall be obtained, as referenced in the “acquisitions” section above.

- Do not exceed the simplified acquisition threshold of \$350,000.
- Obtain price or rate quotation from an adequate number of qualified sources.
- Relatively simple and informal method.

C. Sealed Bids – Bids are publicly solicited and a firm-fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the materials terms and conditions of the invitation for bids, is the lowest in price. The sealed bid method is the preferred method for procuring construction, if the conditions in 44 CFR §13.36, apply.

- Bids publicly solicited and advertised and a firm-fixed-price contract (lump sum or unit price) awarded.
- Adequate and realistic description of the project is available.
- Two or more responsible bidders are able to compete effectively.
- Allow sufficient time for bidders to respond.
- Invitation for bids defines the project adequately.
- Bids publicly opened at the time and place prescribed in invitation.
- Approved and awarded in writing.
- All bids may be rejected for a sound documented reason.

D. Competitive Proposals – The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed-price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. If this method is used, follow guidelines in 44 CFR §13.36, Section 3.

- Bids publicly advertised; identify & all evaluation factors that will be used
- Any response shall be honored to the maximum extent practicable
- Proposals solicited from an adequate number of qualified sources
- Method for conducting technical evaluations of proposals in place

E. Non-competitive Proposals – Solicitation of a proposal from only one source, or after solicitation of a number of sources, competition is determined inadequate. Procurement by noncompetitive proposals may be used only when the award of a contract is infeasible under small purchase procedures, sealed bids or competitive proposal and one of the following circumstances applies:

- The item is available only from a single source
- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation
- The awarding agency authorized non-competitive proposals
- After solicitation of a number of sources, competition is determined inadequate

F. Piggyback Bids - California Public Contract Code, Section 20118, authorizes school districts to order against competitive bids prepared by other school districts (commonly referred to as “piggyback”) and public agencies, provided such authority is granted by the Board of Education and the originating agency at the time of the bid preparation and award of contract. Pursuant to the same code, these public agencies include any public corporation, cooperatives, or agency, including any county, city, town or district.

## **SECTION IV – NUTRITION SERVICES**

In conjunction and in addition to the procedures referenced above the following shall also apply:

### **13. PROCUREMENT POLICIES**

A. Products purchased through fund 13 will adhere to the Buy American Provision (7 CFR, Section 210.21{d} {1-3}. All products will be domestic unless it is not economically feasible or practical.

B. Bids and RFP’s shall reference “equal” alongside any noted brand named product. Details that are required will also be specified. (I.e. 100% beef patty, no fillers, 2-ounce meat/meat alt equivalent or 1 door SS interior and exterior milk cooler, 60”, 120 volts.) A prospective vendor may submit a manufacturer specification and proposal for an equal product. If it is a food item, end product data sheets and a sample for a taste test comparison, must be submitted, prior to the awarding of the contract. For food items, directors and staff will sample various products throughout the year at in-office vendor appointments, local, state and national food shows. Some student testing may also be used to assist in the decision-making process in choosing the noted brand written in the Bid or RFP.

C. The non-Federal entity's procedures must avoid acquisition of unnecessary or duplicative items. Consideration should be given to consolidating or breaking out procurements to obtain a more economical purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.

D. The Nutrition Services Department also adheres to Board Policy 3310, Purchasing Policy. The goal is to seek the maximum value for every dollar expended. The approval process is as follows:

- Nutrition Services staff submits the Request
- Fiscal Services staff verifies the account code and budget
- The Nutrition Services Director approves the expenditure
- Final approval is made by the Chief Business Official
- Purchasing staff generates a Purchase Order and submits to the vendor

- Fiscal Services staff pays the Invoice after the product is received and payment is approved by the Director

The Purchase Order report is submitted to the Purchasing Manager or designee, and the Purchasing Department generates the Purchase Order Report for Board Approval.

#### 14. BID & RFP REQUIRED DOCUMENTS OR CERTIFICATES

- Contractors Certification regarding Alcohol Beverages and Tobacco Free Workplace
- Contractors Certification regarding Drug-Free Workplace
- Suspension and Debarment Certification. The district will validate via the System for Award Management (SAM) website at <https://www.sam.gov>
- Lobbying Activity Certification
- Non-Collusion Declaration
- Equal Opportunity Employment Declaration
- Contractors Certification regarding Worker Compensation
- Iran Contracting Act (>\$1,000,000)
- Clean Air and Water Certification (>\$1,000,000)
- Contract Work Hours and Safety Standards Act Compliance
- SBE, MBE, WBE, Disabled Veterans Business Enterprise

#### 15. DOCUMENTS FOR FOOD PRODUCTS AND PREQUALIFICATION CRITERIA

- HACCP System
- Recall System
- Pest Control Program
- Third Party Inspections
- Health Inspections
- Commodity Tracking

#### 16. EVALUATION PROCEDURES

Request for pricing or proposals will have written a clear and accurate description of the minimum requirements for the material, product and/or services procured. Description will not limit competition. Detailed descriptions are avoided. A brand name may be used to define the requirements. All requirements that vendors or distributors must fulfill will be listed. Any listing of prospective bidders must be kept current to ensure maximum open and free competition. All RFPs are advertised, emailed to prospective vendors, and posted on the website.

- The non-Federal entity must have written procedures for procurement transactions. These procedures must ensure that all solicitations incorporate a clear and accurate description of the technical requirements for the material, product, or service to be

procured. Such description must not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use.

- Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a “brand name or equivalent” description may be used as a means to define the performance or other salient requirements of the procurement.
- The specific features of the named brand which must be met by offers must be clearly stated
- Identify all requirements which the offeror must fulfill and all other factors to be used in evaluating bids or proposals.
- The non-Federal entity must ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the non-Federal entity must not preclude potential bidders from qualifying during the solicitation period.”

#### 17. PROCUREMENT CODE OF CONDUCT

The United States Department of Agriculture (USDA) further requires that non-federal entities adhere to the following:

- Prohibits purchasers from soliciting gifts from prospective bidders, suppliers, and contractors
- Prohibits conflict of interest, using position to influence a decision
- Do not restrict competition
- Do not engage in a conflict of interest
- Prohibits award to a family member
- No gift exclusions
- Getting a cost quote from one vendor

#### **SECTION V - CALIFORNIA DEPARTMENT OF EDUCATION**

In conjunction and in addition to the procedures referenced above the following shall also apply:

18. SCHOOL FOOD AUTHORITIES (SFA):

Open and Free Competition Requirements: Both federal regulations and California state law require all procurements – without regard to dollar value – to be conducted in a manner that promotes maximum open and free competition. School Food Authorities (SFA) must conduct either a formal or an informal process in accordance with Title 2, Code of Federal Regulations, Part 200.319(a).

If you should have any questions about the contents of these policies and procedures, please contact any of the Purchasing Department staff members: Jaime Morales, Purchasing & Risk Management Manager P: (626) 821-6620 email: [jmorales@ausd.net](mailto:jmorales@ausd.net) Lucille Chiu, Purchasing Technician P: (626) 821-6602 email: [lchiu@ausd.net](mailto:lchiu@ausd.net).