

Thompson School District R2-J
VENDOR GUIDE & QUALIFICATIONS FORM

TRADE PRACTICES AND VENDOR RELATIONS

The district Board of Education expects Administration to make every effort to receive optimum value for the dollars spent through sound purchasing procedures. In addition to purchase price, the concept of optimum value encompasses such factors as warranty, future availability, product testing results, local services, maintenance cost, future trade-in value or replacement availability, financial terms for non-cash purchases, availability of training courses, aesthetics, costs of operation, and safety and health features.

A. General Bidding Conditions

Bidders shall thoroughly read the specifications and shall examine any drawings that may be incorporated into the bid documents. As bid documents frequently change for each solicitation, veteran bidders shall not assume that every solicitation contains the same terms and conditions that were supplied in prior solicitations. The district is not obligated to identify either minimal or substantial modifications to bid documents.

Bidders are required to state exactly what they intend to furnish to the district within a solicitation and must indicate any variances to the terms, conditions, and specifications; no matter how slight. If variations are not stated in the bidder's proposal, it shall be construed that the proposal fully complies with all conditions identified in the solicitation.

B. Bid Proposal Clarification and Modification Requests

Any bidder contemplating submitting a proposal under any solicitation is in doubt as to the true meaning of the specifications, the bidder must submit a written request for clarification to the Purchasing Department. The bidder submitting the request will be responsible for ensuring that the district receives the request at least five (5) calendar days (or as stated in the request documents) prior to the scheduled bid due date. The District shall not be responsible for verbal interpretations offered by employees of the District who are not agents of the District's Purchasing Office.

Bid proposals may only be modified in the form of a written notice on company letterhead and must be received prior to the specified due date and time deadline. Each modification submitted to the District's Purchasing Office must have the bidder's name and return address and the applicable Bid Number and title of the bid clearly marked on the face of the envelope. If more than one modification is submitted, the modification bearing the latest date of receipt by the District's Purchasing Office will be considered the valid modification.

C. Submission of Bids

The district's Bid Proposal Form must be used when submitting a bid proposal and any supplemental documentation required shall be furnished by the bidder and be enclosed in a sealed envelope addressed to Thompson School District's Purchasing Office. The Bidder shall include its name and address on the outside of the envelope.

Bid Proposals submitted via facsimile machines may be accepted under mitigating circumstances; provided however, that the Bidder obtains verbal approval from the District Buyer prior to the transmission of the facsimile. The original Bid Proposal must be received by mail or hand delivered to the Purchasing Office within five business days after the date and time of the bid opening. Original Bid Proposals submitted after the five business day period shall be considered non-responsive; thereby invalidating the facsimile transmission.

Late bid proposals will not be accepted or considered. Bid proposals received after the scheduled due date and time deadline shall be considered non-responsive and returned unopened to the bidder. Bid proposals submitted via facsimile that are transmitted after the due date and time shall be considered non-responsive and transmitted back to the bidder. It is the responsibility of the

bidder to insure that the bid arrives by the time and at the place indicated. While we recognize unforeseen circumstances can cause delays, all bid requests delivered after the due date and time deadline MUST be disqualified.

D. Awarding of Bids

Bids will be awarded to the lowest responsive and responsible bidder whose bid is most advantageous in price, conformity to the specifications and other specified criteria as determined by the Purchasing Department to be in the best interest of the District. Thompson R2-J School District is interested in supporting the local business community. Local merchants will not receive preferential consideration with regards to price, availability, or quality. If all established criteria are met and there is a tie, however, the local vendor will be awarded the order. The district reserves the right to reject any and all bids, in whole or in part, and to accept that bid which appears to be in the best interest of the school district.

The District shall award a contract to a bidder through the issuance of a Purchase Order. The General Terms and Conditions, the Special Conditions, any Technical Specifications, the Bidder's Proposal, and the Purchase Order are collectively an integral part of the contract between Thompson School District R2-J and the successful Bidder. Accordingly, these documents shall constitute a binding contract without further action by either party.

E. Warranty/Manufacturer's Recommendations

Equipment, supplies/materials, and/or services furnished under any purchase order issued by Thompson School District R2-J shall be covered by the most favorable commercial warranties the bidder gives to any customer for such equipment, supplies/materials and services. All warranty information and certificates shall be furnished and become the property of the District upon delivery of said items and all rights and remedies stated in the warranties must be honored by the bidder or his manufacturer. All items shall be new manufacture unless otherwise specifically stated or called for in the bid process. All products offered must have passed the first line quality standard as set by the manufacturer and no seconds, blemished articles, or items containing defective workmanship are included.

F. Tax Exempt Status and Payment Procedures

Thompson School District R2-J is exempt from manufacturer's federal and state sales tax. A copy of the district's tax-exempt certificate will be provided upon request. **Standard payment terms of the district are Net 30 days.** No payment for goods or services shall be made without an original, itemized invoice showing the name of the person or firm to whom payment is due and a receiving document bearing the signature of an authorized school district employee. The invoice, receiving report, and purchase order will be reviewed to ensure they are in agreement.

G. Lease/Purchase, Installment Purchase

The procurement process for rental with the option to buy, lease/purchase, or installment purchase of any materials or equipment shall be performed by the Purchasing Department according to the guidelines for competitive procurement of goods and within all Tabor Amendment requirements. Multi-year financial commitments require District Board of Education approval and contracts shall not be valid if approved in any other manner and/or by any other District Official.

H. Gratuities and Conflict of Interest

No favoritism shall be extended to any vendor. All employees of the District will exercise sound judgment in avoiding conflicts of interest or the appearance of impropriety in dealing with vendors. Gifts, or gratuities of other than nominal value or which might obligate a District employee in any manner shall be politely and firmly refused. Any vendor or bidder who offers items in excess or in violation of the spirit of these guidelines may be disqualified indefinitely.

No person officially connected with or employed by the District shall be an agent or be in any way pecuniary or beneficially interested in, or receive any compensation or reward of any kind from any vendor, for the sale of supplies, material, equipment or services to the District without the express prior written consent of the Board of Education. All bidders must disclose with their proposal the name of any officer, director, or agent who is also an employee of the district. No district employee and no firm owned in whole or in part by a district employee, will be allowed to sell to the district or to students of the district, goods or services of any kind without the expressed prior approval of the Board of Education.

PURCHASING PROCEDURES

The Purchasing Department shall strive to achieve the best price for the district while allowing the district to operate efficiently and economically. The Purchasing staff shall either review or solicit all purchase requests to ensure sound purchasing procedures were followed and adequate pricing comparisons were obtained before submission to the appropriate administrator for authorization. Whenever possible, at least one quote shall be obtained from a local vendor. A purchase order number is required to place orders over \$250. In order to comply with Board purchasing policy and procedures, the following guidelines shall be followed:

A. Small Dollar Purchases

The purchase of any item with a unit cost of less than \$1500, and orders totaling less than \$3000 that include no individual item above \$1500 unit cost are recommended to be processed as a procurement card transaction or with a purchase order number assignment. All procurement cardholders must comply with the terms and conditions of the cardholder handbook and agreement.

B. Purchases over \$1500 unit cost up to \$3000 cumulative

Three telephone quotes or written quotes must be obtained for the purchase of any individual item above \$1500 unit cost and for any cumulative order totaling more than \$3000 but not exceeding \$5,000. All purchase requests shall either be reviewed or solicited by the Purchasing Department.

C. Purchases exceeding \$5,000

Purchases totaling over \$5,000 and up to \$10,000 require the receipt of at least three written quotations, if reasonably available. All purchases shall either be reviewed or solicited by the Purchasing Department.

D. Purchases exceeding \$10,000

Purchases totaling over \$10,000 but less than \$25,000 shall be overseen by the Purchasing Department. An Invitation to Bid request or Request for Proposals process may be used for these orders, subject to Purchasing Department review.

E. Purchases over \$25,000

Purchases over \$25,000 shall be made by Formal Bidding procedure. The Purchasing Department will facilitate all formal bids. These solicitations require legal notice advertising in a local publication. Purchases over \$50,000 must be approved by the Board of Education before a contract is awarded.

F. Purchased Services

All purchased services requests shall either be reviewed or solicited by the Purchasing Department. Services totaling less than \$5,000 will be authorized after receipt of a written proposal and a purchase order number assigned. Purchased services totaling over \$5,000 will not be authorized without the receipt of at least three written quotations, if reasonably available. Request for Quotation, Invitation to Bid, or Request for Proposals may be used for these orders, subject to Purchasing Department review.

G. Emergency Purchases

If a condition develops that is likely to result in immediate physical injury to persons, damage to district property or significant financial loss to the district if action is not taken immediately, limited emergency purchases can be made without following the competitive bid procedures if the superintendent or designee so authorizes.

H. Sole Supplier Justification

In some instances, where there is a single supplier of a specific item, the bid and price quotation procedure may be waived with the approval of the superintendent or designee after other requirements of Board policy are adequately met. All requests for purchase of a product or service from a single vendor must first be authorized by the appropriate administrator and forwarded to the superintendent or designee for approval. When there is a request to purchase a specific product or to use a specific vendor, the following detailed information will be required: Unique features of the product must be identified; If there are other similar products available, the reasons must be described why those products do not meet district needs; If maintenance costs or service considerations are an issue, evidence of past service problems or benefits must be obtained.

PURCHASING BUYING AND BIDDING METHODS

The district utilizes informal and formal buying and bidding methods to purchase goods and services. Award will not always be made based on price alone. Other factors such as quality, availability, value-added services and vendor past performance will also be taken into consideration before an award is made.

A. Procurement Cards

Purchasing Services, in cooperation with Business Services, may issue procurement cards to authorized employees to be used for small purchases within restricted dollar and commodity limits. These purchase requests do not require competitive bidding.

B. Request for Quotation

A Request for Quotation is an informal or semi-formal document used by the District to request offers to award contracts for an estimated value of at least \$3000 but not over \$25,000 when sealed bidding is not practicable or advantageous. The Request for Quotation consists of specific instructions to bidders, specifications for each line item, and applicable terms and conditions of the awarded contract. A time and date deadline may be assigned to the bid. Contracts can be awarded by line item or on an all-or-none basis. There is no advertising or District Board of Education approval required.

C. Request For Information (RFI)

A Request For Information document is used to further research and obtain specific information from vendors on a particular item or service. This document may also serve as a prerequisite for vendor participation in a specific Invitation to Bid or Request For Proposal to be issued at a later date.

D. Invitation to Bid

An Invitation to Bid request is a document used to initiate formal competitive sealed bidding. Competitive sealed bidding is the District's preferred method of awarding contracts for an estimated value of \$25,000 or greater. The Invitation to Bid consists of detailed, specific instructions to bidders, specifications for each line item and a reasonable time and date deadline is assigned to the bid. Contracts can be awarded by line item or on an all-or-none basis. Invitation to Bid packages are opened publicly by the Buyer on the due date and time stated on the bid. Vendors are always welcome to attend the bid opening. Information on bid awards will be available within a few days after the opening. You may call the Purchasing Department for results during regular business hours.

E. Request For Proposal (RFP)

A Request For Proposal is a document utilized for the procurement of services (consulting services, etc.) or when competitive sealed bidding is not practicable because technical and performance capability must be evaluated. The RFP will specify the evaluation factors to be used and contained or incorporated by reference, and other applicable contractual terms and conditions. In contrast to competitive bidding, the procedure permits negotiation of proposals and prices. Request for Proposals close on the due date and time designated on the RFP documents and are not subject to public opening. Proposals are then reviewed for acceptance by the Purchasing Department before being evaluated by a district committee.

F. Cooperative Purchasing

For the purpose of increasing efficiency and/or reducing administrative expenses, the district may join and participate in cooperative procurement agreements with one or more public agencies. The district may participate in or purchase goods and services through contracts awarded by other governmental agencies when the contract is based on competitive principles and the pricing is determined to be in the district's best interests.

G. Discount Pricing Agreements

The purpose of a pricing agreement is to establish a contractual relationship between the district and a vendor for the purchase of items at a percentage discount off published catalog, price lists or retail pricing. The discount terms offered through the agreement are extended for use district-wide. Vendors offering percentage discounts of at least 20% will be designated with favored vendor status for the user to consider when selecting a vendor for a purchase order. The district may at any time supersede the pricing agreement and obtain competitive bids in its best interest.

HOW TO BECOME ELIGIBLE TO SELL TO THE SCHOOL DISTRICT

All bidders are required to have a current vendor qualification form on file with the District's Purchasing Office prior to the issuance of any purchase order. It is the bidder's responsibility to regularly update its application with new addresses, telephone numbers, contact persons, and a current listing of commodities and services provided by the bidder.

A. Registration Procedures

A vendor or contractor wishing to do business with the District must complete a Vendor Qualification Form with the Purchasing Department. An application is provided in the back of this guide. The form should be completed and returned to the Purchasing Department. Once the completed application has been received and approved, your company will be assigned a vendor number. Please notify the Purchasing Department in writing of any changes in the status of your business.

B. Rocky Mountain Governmental Purchasing Association

For the opportunity to participate in our Invitations to Bid, Requests for Information, Requests for Purchase and/or Requests for Quotes, you must be registered with Rocky Mountain E-Purchasing. Please visit their website at www.rockymountainbidssystem.com for more details.

C. Evaluation of Vendor's Mailing List

Our bid lists will be maintained by continuous evaluation of vendor performance by reviewing on-time delivery promises, quality of merchandise, customer service practices and competitive pricing.

D. Removal from Vendor's Mailing List

A vendor may be removed from the qualified Vendor's List for any of the following reasons:

1. Consistent failure to respond to a request for quote within the time allowed. Failure to respond to three successive solicitations will constitute sufficient grounds for removal from the vendor's mailing list. If you do not wish to make an offer on a particular purchase, return a "no bid" rather than not responding at all. This will indicate your continued interest in doing business with the District.
2. Inferior quality of goods or services.
3. Delivery and price inconsistencies from those established at time of the order.
4. Repeated non-competitive quotations.
5. Offers of gifts or other compensation to employees of the School District in exchange for placing orders with vendor.
6. Financial condition that was not reported to the School District that could jeopardize successful completion of a contract awarded to you.
7. Substitution of materials/services without prior authorization from the School District.
8. Failure to honor all guarantees and warranties, expressed or implied, in the bid or quotation process.
9. Eighteen months of inactivity, unless a letter is received indicating vendor's desire to remain on the Districts List of Approved Vendors.

Thompson School District R2-J
VENDOR APPLICATION FORM

Please complete both pages of this form and the form W-9 and returned to Thompson School District R2-J for approval. All pertinent attachments and/or brochures elaborating your company's procedures, goods and services are welcomed. Complete and signed forms should be mailed to:

Thompson School District R2-J
Materials & Procurement Department
800 South Taft Avenue | Loveland, CO 80537

Company Name: _____ Phone No: _____

Street Address: _____ Fax No: _____

City, State, Zip Code: _____

Web-Site: _____ E-Mail Address: _____

Management Personnel:

Name: _____ Title: _____

Name: _____ Title: _____

Name: _____ Title: _____

Are you incorporated? _____ Year incorporated: _____ State of incorporation: _____

Federal Tax ID Number: _____ State Tax ID Number: _____

Product/Service Type and description: _____

Normal Delivery Lead time to expect: _____

Minimum Order Requirements: _____

Special Services your company can provide: _____

Freight/Shipping Terms: _____

The standard district payment terms are net 30. Does your company offer an early payment discount? If so, please provide the terms here: _____% _____ Days.

Return Policy Information: _____

Warranty Service provided by: _____

Would your company establish a discount pricing agreement with the district? If so, provide details: _____

Sales Representative Contact Info: _____

Customer Service Representative Contact Info: _____

Please list three business references:

Company: _____

Contact: _____ Title: _____

Address: _____ Phone: _____

Company: _____

Contact: _____ Title: _____

Address: _____ Phone: _____

Company: _____

Contact: _____ Title: _____

Address: _____ Phone: _____

Printed Name: _____ Title: _____

Signature: _____ Date: _____

FOR SCHOOL USE ONLY

Date Received: _____ Bid Categories: _____

Vendor ID No. Assigned: _____ Approved by: _____

Comments: _____