

PURCHASING, BIDDING, SMALL WORKS ROSTER AND PUBLIC WORKS PROJECTS

PURCHASING AND BIDDING REQUIREMENTS

Whenever the estimated cost of purchasing furniture, equipment or supplies equals or exceeds \$75,000 the formal bid process described in B1 through B5 on page 2 must be followed. When the estimated cost equals or exceeds \$40,000 but is less than \$75,000, the Superintendent or designee must solicit bids but does not have to go through the formal bid process. Solicitation of such bids may be made through telephone, electronic or written means from at least three vendors.

PUBLIC WORKS PROJECTS

For public works projects involving any number of trades, the District may make improvements or repairs through the maintenance department of the District when the total cost of the improvements or repairs will not exceed \$75,000. Whenever the estimate of a public works project is in excess of the limits mentioned above, it shall be awarded on a competitive bid process to the lowest responsible bidder. The competitive process may vary depending on the estimated cost as follows:

1. Public works projects estimated to cost at least \$40,000 but not exceeding \$100,000 may be accomplished through a competitive process per RCW 28A.335.190. This process shall include requesting a minimum of three quotes from responsible contractors.
2. Public works projects estimated to cost at least \$100,000 but not exceeding \$300,000 may be accomplished by either of the following methods:
 - a. Bids may be called for using the formal bid process described in B1 through B5 of these procedures; or
 - b. A small works roster process, meeting the requirements of RCW 39.04.155 may be utilized.

When using the small works roster, bids may be invited from all appropriate contractors on the roster or from at least five appropriate contractors on the roster in a manner that will give all contractors an equitable chance to obtain projects. In addition, if the estimated cost of the project will be from \$100,000 to \$300,000, all appropriate contractors on the small works roster must be notified that bids are being sought for the project. Such notice may be accomplished by a publication in a newspaper of general circulation within the District.

3. Public works projects estimated to cost in excess of \$300,000 shall be awarded through the formal bid process described in the next section of these procedures.

FORMAL BIDDING REQUIREMENTS

The following procedures shall be in effect for purchasing through the formal competitive bidding process, unless a purchase is otherwise exempted:

1. Bids shall be submitted in writing, opened and read in public at the time and place stated in the official advertisement for bids. It shall be the bidder's sole responsibility to see that their bid is delivered to the District prior to the time set for opening of bids. Any bid received after the time set for opening the bids shall be returned to the bidder unopened and shall receive no consideration by the District.
2. Bid results shall be presented to the Board for consideration of award in a timely manner.
Selection of the successful bidder shall be made by the Board with the assistance of staff recommendations.
3. Brand names and manufacturers' catalog numbers used in specifications are for the purpose of identification and to establish a standard of quality. Bids on equal items shall be considered providing the bidder specifies brand and model and furnishes descriptive literature. The acceptance of alternative "equal" items shall be conditioned on the District's inspection and testing after receipt. If not found to be equal, the material shall be returned at the seller's expense and the contract canceled.
4. The District shall reserve the right to reject any or all bids, waive any formalities and make the award in its best interest.
5. On construction projects, the bidder shall submit all required documentation requested in the bid specifications in addition to providing the project cost. Contracts will be awarded to the lowest responsible bidder. Factors to be considered in determining the lowest responsible bidder in addition to cost include:
 - a. The ability, capacity and skill of the bidder to perform the work required;
 - b. The character, integrity, reputation, judgment, experience and efficiency of the bidder;
 - c. The ability of the bidder to perform the work in the time specified;
 - d. The quality of performance of previous contracts or services;
 - e. The previous and existing compliance of the bidder with laws relating to public works;
and
 - f. Such other information related to the performance of the contract, as the District deems advisable.

SMALL WORKS ROSTER REQUIREMENTS

The following procedures shall be in effect for maintaining a small works roster:

1. The small works roster shall be updated at least once each year by publishing a notice in at least one newspaper of general circulation in the District. Such notice shall indicate where contractors may secure information and application forms related to the small works roster.
2. Interested contractors must complete an application form that is designed to collect such information as name of contractor, State of Washington contractor's license number, bonding verification, insurance coverage, related contracts completed, and references.
3. Contractors shall be added to the small works roster at any time they submit a completed application form.

UTILIZATION OF SMALL WORKS ROSTER

The following procedures shall be in effect for utilizing the small works roster for a project:

1. Written plans and specifications shall be prepared which describe the scope and nature of the work to be performed, materials to be used; the required completion date and all documentation requirements that the contractor must meet.
2. Bids shall be solicited from qualified contractors and the contract awarded to the lowest responsible bidder.
3. Annually a list of contracts awarded to contractors on the small works roster shall be made available for public inspection.

LIMITED PUBLIC WORKS

Whenever the estimated cost of a public works project is less than \$35,000, the Superintendent or designee may declare the project to be a "Limited Public Works" project. The District can assume some level of risk and waive the performance bond, retainage and prevailing wage paperwork of the contractor. The contractor is still required to provide any necessary documentation to state officials. If a project is declared to be a "Limited Public Works" project, it must be awarded to a vendor on the Small Works Roster.

District officials should complete Form 6210, Bidding and Public Works Checklist as a guide for proceeding with a public works project.

Lynden School District No. 504
BOARD POLICY

No. 6210P

An acceptable bid or offer and a District purchase order shall constitute the only contract necessary for the purchase of furniture, equipment or supplies and minor repairs or construction projects.

Formal written contracts shall be prepared for all major construction and repair projects. Such contracts shall include language necessary to protect the rights of the District. Contracts involving formal bid awards shall be signed by the Superintendent or designee on behalf of the District, after approval by a majority vote of the Board.

August, 2015

BIDDING AND PUBLIC WORKS CHECKLIST

Project Description: _____

Estimated Start/End Dates: _____

Firm Cost Estimate: (including tax) _____

BID REQUIREMENTS

1. Is estimated cost less than \$300,000?

If No, project must be formally bid. District may act as own general contractor but then every component of project must be formally bid.

If Yes, proceed to #2.

2. Is cost less than \$40,000

If Yes, no bidding required – any alternative purchasing method may be used.

If No: If cost \$40,000 – 100,000 may use 3 quote method, Small Works Roster or formal bid.

If cost \$100,000 - \$300,000, may use Small Works Roster or formal bid.

Director of Operations/Personnel

Date _____

Director of Finance

Date _____

Budgeted Yes____ No_____

**BIDDING
DOCUMENTATION**

Project Description: _____

Specifications of Project/Purchase: _____

Estimated Start/End Dates: _____

Firm Cost Estimate (including tax): _____

Select Method to be Used:

- Three quote method Small Works Roster Formal Bid

Vendor Works/Roster	Quote (written/verbal)	Representative	Amount	Date	Small (yes/no)
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Vendor Works/Roster	Quote (written/verbal)	Representative	Amount	Date	Small (yes/no)
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Vendor Works/Roster	Quote (written/verbal)	Representative	Amount	Date	Small (yes/no)
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Additional Comments: _____

Vendor Selected: _____

Superintendent	Date
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Director of Finance Budgeted: <input type="checkbox"/> Yes <input type="checkbox"/> No	Date
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