



**Weston Public Schools**  
**Procurement Guidelines (M.G.L. Chapter 30B)**

Finance and Operations Office  
 89 Wellesley Street  
 Weston, MA 02493

<b>Procedure:</b>	Chapter 30B Procurement	<b>Revised Date:</b>	August, 2014
<b>Policy:</b> M.G.L. Chapter 30B shall govern all procurements of supplies and services, unless specifically exempted or covered by other state or federal laws.			
The purpose of the Procurement Guidelines form is to provide information on the M.G.L. 30B Uniform Procurement Act for goods and services.			
<b>Completed By:</b>	Purchase Order	<b>Reviewed By:</b>	Head Bookkeeper
<b>Approved By:</b>	Assistant Superintendent for Finance and Operations	<b>Entered By:</b>	N/A
<b>Form Title:</b>	M.G.L. Chapter 30B	<b>Estimated Time Frame:</b>	Annual Training of Relevant Staff
<b>Process for Completion:</b>			
M.G.L. Chapter 30B (Uniform Procurement Act) governs how school districts procure goods and services, as amended in July 2013.			
This law is enforced by the Inspector General's Office.			
All purchases made through the general operating budget, WEEFC, grants and revolving funds must abide by the Uniform Procurement Act.			
In summary, Chapter 30B requires:			
	Sound Business Practices		\$0 - \$9,999
	Solicit three (3) written or oral quotes		\$10,000 - \$34,999
	Sealed bid or proposal process		\$35,000+
Purchase orders that equal to or exceed \$5,000 will be required to meet the requirements of Chapter 30B.			
The solicitation of quotes must assure the same information is solicited from three or more companies. To ensure consistency of information being provided to the prospective companies, a quote sheet has been created and is attached. When entering a requisition, the quotes should be sent to the Assistant Superintendent for Finance and Operations prior to approval being granted.			
Sealed bids or request for proposals are done in conjunction with the Assistant Superintendent of Finance and Operations. When developing plans, please expect a 4-6 week turnaround for a sealed bid or request for proposal. When entering a requisition, a note should be added to the Vendor/Sourcing note section indicating the contract is on file with the Business Office.			
The Procurement Grid is attached for reference.			
<b>For additional information, please contact:</b>			
<b>Name:</b>	Cynthia D. Mahr	<b>Email:</b>	<a href="mailto:mahrc@weston.org">mahrc@weston.org</a>
<b>Phone:</b>	781-786-5230	<b>Fax:</b>	781-786-5279
<b>External URL:</b>	www.westonschools.org		
<b>Weston School Committee Policy:</b>	Purchasing and Contract Authority, DJ/DJE; Purchasing and Bidding Requirements, DJE		

**Finance and Operations Summary**

	<b>General Fund</b>	<b>Grants</b>	<b>Revolving Funds</b>	<b>WEEFC</b>	<b>Student Activity Accounts</b>	<b>PTO</b>
<b>Payroll</b>	Time sheet required to process a payment to an employee for work performed; rate of pay must comply with contractual agreements	Time sheet required to process a payment to an employee for work performed; rate of pay must comply with contractual agreements and/or grantees approval	Time sheet required to process a payment to an employee for work performed; rate of pay must comply with contractual agreements	Time sheet required to process a payment to an employee for work performed; rate of pay must comply with contractual agreements	Employees cannot be paid directly from SAA. Time sheet required to process a payment to an employee for work performed; rate of pay must comply with contractual agreements. Contact the Assistant Superintendent for Finance and Operations for assistance.	See PTO
<b>Procurement</b>	The purchasing of goods and services must comply with M.G.L. Ch. 30B laws.	The purchasing of goods and services must comply with M.G.L. Ch. 30B laws.	The purchasing of goods and services must comply with M.G.L. Ch. 30B laws.	The purchasing of goods and services must comply with M.G.L. Ch. 30B laws.	The purchasing of goods and services must comply with M.G.L. Ch. 30B laws.	See PTO
<b>\$0 - \$9,999</b>	Sound business practices expected	Sound business practices expected	Sound business practices expected	Sound business practices expected	Sound business practices expected	See PTO
<b>\$10,000-\$34,999</b>	Solicit three written or oral quotes. Attach quotes to the Purchase Order.	Solicit three written or oral quotes. Attach quotes to the Purchase Order.	Solicit three written or oral quotes. Attach quotes to the Purchase Order.	Solicit three written or oral quotes. Attach quotes to the Purchase Order.	Solicit three written or oral quotes. Attach quotes to the Purchase Order.	See PTO
<b>\$35K +</b>	A sealed bid or proposal process must be followed. Please contact the Asst. Supt. for Finance and Operations for guidance.	A sealed bid or proposal process must be followed. Please contact the Asst. Supt. for Finance and Operations for guidance.	A sealed bid or proposal process must be followed. Please contact the Asst. Supt. for Finance and Operations for guidance.	A sealed bid or proposal process must be followed. Please contact the Asst. Supt. for Finance and Operations for guidance.	A sealed bid or proposal process must be followed. Please contact the Asst. Supt. for Finance and Operations for guidance.	See PTO
<b>Purchase Order Required</b>	Yes	Yes	Yes	Yes	N/A	N/A
<b>Contracts</b>	All contracts must be reviewed and signed by the Assistant Superintendent for Finance and Operations. Purchases in excess of \$5,000 require a written contract. All appropriate insurance requirements must be met.	All contracts must be reviewed and signed by the Assistant Superintendent for Finance and Operations. Purchases in excess of \$5,000 require a written contract. All appropriate insurance requirements must be met.	All contracts must be reviewed and signed by the Assistant Superintendent for Finance and Operations. Purchases in excess of \$5,000 require a written contract. All appropriate insurance requirements must be met.	All contracts must be reviewed and signed by the Assistant Superintendent for Finance and Operations. Purchases in excess of \$5,000 require a written contract. All appropriate insurance requirements must be met.	All contracts must be reviewed by the Assistant Superintendent for Finance and Operations and can be signed by either the Principal or Director (only). All appropriate insurance requirements must be met.	Contracts should be reviewed by the Assistant Superintendent for Finance and Operations if funding for the event is shared with WEEFC or other school funds.
<b>W9 Form</b>	Required for all new vendors and vendors with a change of address.	Required for all new vendors and vendors with a change of address.	Required for all new vendors and vendors with a change of address.	Required for all new vendors and vendors with a change of address.	N/A	See PTO
<b>Student Awards</b>	Allowable provided they are reasonable. Please discuss with the Asst. Supt. for Finance and Operations when preparing the Purchase Order.	Allowable provided they are expressly approved by the grantee.	Allowable if approved in advance by the Assistant Superintendent for Finance and Operations.	Allowable provided they are expressly approved by WEEFC.	Allowable provided they are reasonable and supported by a vote of the Student Activity group. Documentation must be maintained.	See PTO
<b>Teacher Gifts</b>	Not allowable.	Not allowable.	Not allowable.	Not allowable.	Allowable provided they are reasonable and supported by a vote of the Student Activity group. Documentation must be maintained; must conform to State Ethics laws governing gifts.	See PTO; must conform with State Ethics laws governing gifts.
<b>Parent Gifts</b>	Not allowable.	Not allowable.	Not allowable.	Not allowable.	Allowable provided they are reasonable and supported by a vote of the Student Activity group. Documentation must be maintained.	See PTO

**Weston Public Schools  
Request for Quotes Form**

Requisition #: \_\_\_\_\_ School/Department: \_\_\_\_\_

Purchase Description and Contract Terms:

Quality Requirements:

Vendors Contacted	Unit Price(s)	Est. or Actual Quantities	Total Price Quote	Req. Met (Y or N)
Company Name: _____ Contact Name: _____ Address: _____ Date: _____ Telephone: (____) _____ Fax: (____) _____ Solicited By: _____				

Notes:

Company Name: _____ Contact Name: _____ Address: _____ Date: _____ Telephone: (____) _____ Fax: (____) _____ Solicited By: _____				
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Notes:

Company Name: _____ Contact Name: _____ Address: _____ Date: _____ Telephone: (____) _____ Fax: (____) _____ Solicited By: _____				
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Notes:

Recommendation: \_\_\_\_\_ Recommended by: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_