

BOARD OF EDUCATION OF THE CITY OF NEW YORK  
DIVISION OF SCHOOL FACILITIES  
OFFICE OF BUILDING SERVICES

January 11, 2002

OFFICE OF BUILDING SERVICES CIRCULAR NO. 7 - 2001/02

NOTE: All Circulars are to be kept in a permanent file

TO ALL CUSTODIAN ENGINEERS & BUILDING SUPERINTENDENTS

1. STANDARD OPERATING PROCEDURE MANUAL (SOPM) ON PURCHASING

As a follow-up to a recent arbitration ruling, we are re-issuing this circular to remind you of your responsibilities concerning purchases reported on P.O. #2's.

BASED ON THE ARBITRATION RULING, CUSTODIAN ENGINEERS ARE REQUIRED TO FOLLOW TWO (2) SEPARATE GUIDELINES ON PURCHASES AND INHERENT IN THE BIDDING PROCESS WE ARE REQUIRED TO SELECT THE LOWEST RESPONSIBLE BIDDER.

a. GUIDELINES TO BE FOLLOWED ON THE PURCHASE OF ALL EQUIPMENT

<u>Purchases Between</u>	<u>Guidelines</u>
\$ 0 - \$ 250	No Bids Required
251 - 1,000	Three (3) Telephone Bids Required (Record Bids on the Attached Form)
1,000 - 10,000	Three (3) Written Bids Required
\$10,001 - above	No Purchases are allowed

b. GUIDELINES TO BE FOLLOWED ON PURCHASES OF ALL GOODS, REPAIRS, MATERIALS, SUPPLIES, SERVICE CONTRACTS (I.E., WINDOW CLEANING, ETC)

<u>Purchases Between</u>	<u>Guidelines</u>
\$ 1 - \$ 250	Bids Are Not Required Limited up To \$2,500 per Vendor For The Calendar Year (January 1 - December 31)

**NOTE:** Please adhere to the appropriate bidding requirements as stated below if an individual purchase exceeds \$250 or the expenditures associated to the same Vendor will exceed \$2,500, within the same calendar year.

\$ 251 - \$ 5,000

You must solicit a minimum of three (3) bids via telephone.

You must receive actual, detailed, responsive bids from at least two (2) Vendors.

Document bids received on the attached Bid Summary Form (copy attached).

Written bids are not necessary.

**NOTE:** If the expenditures associated to the same vendor will exceed \$5,000 within the same fiscal year, you are required to solicit three (3) bids which are to be confirmed in writing if additional purchase from the Vendor will be made.

**STANDARD OPERATING PROCEDURE (SOPM) ON PURCHASING, Continued****Purchases Between****Guidelines****\$ 5,001 - \$10,000****You must solicit a minimum of three (3) faxed or written bids.****You must receive actual, detailed responsive bids (written on company letterhead or invoice) from at least two (2) Vendors.****Document bids received on the attached Bid Summary Form (copy attached).****\$10,001 - above****You are precluded from making any individual purchase without prior approval from both your District and Borough Plant Manager.****Purchases at this threshold can only be made against existing Board of Education, City or State, contracts that are available to the Board of Education. Purchases against valid contracts can, on a cumulative basis, exceed \$10,000.**

In conjunction with the above guidelines, please reference Plant Operations Circular No. 14 - 1998/99 on sales tax. There are no limits or bidding requirements if you access valid Board of Education, City or State contracts and attach supporting documentation to your normal P.O. #2's. Responsibility for keeping track of how much money is being spent per Vendor in reference to the above thresholds of \$2,500 and \$5,000 belong to each individual Custodian Engineer. Purchases cannot be intentionally split apart to avoid the above bidding requirements. For example, if you want to buy two (2) storage cabinets that cost \$210 each, the total purchase price is \$420 and you need to solicit, record, and select the low bidder. You cannot buy one (1) cabinet on Monday for \$210 and one (1) cabinet on Friday for \$210 to avoid soliciting bids from comparable Vendors. Finally, please attach all bids, receipts, and bid summary forms (when applicable) to your P.O. #2's.

If you need additional information, please contact your District Plant Manager or call Louis G. Sommo at (718) 391-6901.

Joseph P. Nappi  
Chief Executive (Acting)  
Division of School Facilities

JPN/LGS:ns  
Enclosures: Bid Summary Form (2)

BOARD OF EDUCATION OF THE CITY OF NEW YORK  
DIVISION OF SCHOOL FACILITIES  
DEPARTMENT OF PLANT OPERATIONS

BID SUMMARY FORM

Specification/Brand/Model # For \_\_\_\_\_

Items Being Purchased: \_\_\_\_\_

Telephone Bids \$251-\$5,000  
Vendor Price Quote

Written Bids  
\$5,001-\$10,000  
Vendor Price Quote

1. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Telephone No. \_\_\_\_\_  
Fax No. \_\_\_\_\_  
Date: \_\_\_\_\_

2. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Telephone No. \_\_\_\_\_  
Fax No. \_\_\_\_\_  
Date: \_\_\_\_\_

3. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Telephone No. \_\_\_\_\_  
Fax No. \_\_\_\_\_  
Date: \_\_\_\_\_

Borough / School \_\_\_\_\_

PO 2 Period Ending \_\_\_\_\_

(circle successful bid and price quote -- Please attach  
copies where applicable)

Custodian's Name \_\_\_\_\_

Signature \_\_\_\_\_