



THE FOCUS

A WISCONSIN ASSOCIATION OF SCHOOL BOARDS, INC.
POLICY PUBLICATION

VOLUME 27, No.3
DECEMBER 2009

SUPPORTING THE COMMUNITY THROUGH LOCAL PURCHASING

“Our policy is about ensuring opportunity for local vendors. It serves as a starting point in the purchasing process, to emphasize the importance of supporting our local constituents as they support our school district.”

*Larry Brown
Superintendent*

*Monroe Area
Public School
District*

In these tough economic times, many individuals and institutions are not only looking for ways to best manage their own financial situations but also to provide support for others in the process. School districts are no different.

One way school districts are trying to help support their local economies and constituents and get the “most bang for their buck” is by purchasing locally whenever possible. This issue of *The FOCUS* will discuss how some Wisconsin school districts are doing this through local purchasing policies and programs.

GENERAL CONSIDERATIONS

School officials should make all purchasing decisions, whether buying locally or elsewhere, based on reasonable business judgment. In addition, they should keep in mind the following specific considerations:

- **Purchasing Authority** - School boards have substantial discretion in awarding purchasing contracts. Generally, school boards are not required to competitively bid for goods and services except as specifically required by law or agreed to by the district in contracts with state or federal agencies or as a condition of acceptance of a grant.

Therefore, any bidding procedures should be carefully structured in order to avoid limiting the discretion of the board to choose the appropriate contractor. If school districts voluntarily decide to establish competitive bidding procedures, they may not be legally free to abandon the procedures in the middle of the bidding process.

- **Child Nutrition Program Purchasing Requirements** - School districts participating in federally subsidized child nutrition programs (e.g., National School Lunch and Breakfast Programs) are required to abide by all related U.S. Department of Agriculture (USDA) regulations, including those related to the purchase of food, supplies and equipment, food preparation, and food safety.

Competitive sealed bids or proposals are required for purchases totaling \$100,000 or more annually. Price quotations can be used for purchases less than \$100,000 annually. If a district has a lower purchasing threshold than this, then the local school food authority must follow that guidance.

As of October 1, 2008, child nutrition programs can apply a geographic preference (state, county and/or region)

when purchasing unprocessed locally grown and locally raised agricultural products, that have not been cooked, seasoned, frozen, canned or combined with any other products. Necessary handling to present an agricultural product to a school food authority in a usable form, such as washing vegetables, bagging greens, butchering livestock and poultry, pasteurizing milk and putting eggs in a carton is acceptable.

While a geographic preference may be used to encourage the purchase of locally grown and locally raised products by enabling an institution to grant an advantage to local growers/producers, this provision does not eliminate the requirement for procurements to be conducted in a manner that allows for free and open competition, consistent with the purchasing institution's (e.g., school district) responsibility to be stewards of federal funds.

According to the USDA, an institution must still get quotes from a reasonable number of growers/producers when procuring unprocessed locally grown or locally raised agricultural products, so that competitors have an opportunity to compete for the bid.

Due to the geographic diversity in each state, the institution responsible for the procurement has the discretion to define the area for any geographic preference (state, county, region, etc.). According to the USDA, it is important to keep in mind that local preference should not be defined in a way that unnecessarily limits competition.

The state of Wisconsin considers any farmer to be an approved food source, according to the DPI. However, it is beneficial for

schools to establish a standard process for purchasing foods from local growers which can be based on current Standards of Practices (SOPs) for fruit and vegetable procurement from current distributors.

- **Cooperative Purchasing** – Districts have authority under section 66.0301 of the state statutes to enter into cooperative purchasing agreements with other municipalities, including the state or any department or agency thereof, other school districts, cities, counties, villages and towns.
- **Conflict of Interest/Code of Ethics** – Board members and administrators involved in purchasing decisions should note laws on conflict of interest and the local government code of ethics.

Section 946.13(1) of the state statutes prohibits any public officer or employee to negotiate, bid for or enter into a contract in which he/she has a private pecuniary interest, direct or indirect, if at the same time he/she is authorized or required by law to participate in his/her official capacity in the making of that contract or to perform in regard to that contract some official function requiring the exercise of discretion on his/her part. Exceptions to this provision are specifically outlined in section 946.13(2) of the state statutes.

Additional information on board member conflicts of interest may be found in the May 1998 and November 2004 WASB "Legal Comments", which are accessible on WASB's Web site (www.wasb.org).

Vendors may use a number of approaches to secure the district's business. School officials are reminded that section 946.10 of the state

statutes prohibits any public officer or public employee to directly or indirectly accept or offer to accept any property or personal advantage pursuant to an understanding that he/she will act in a certain manner in relation to any matter which by law is pending or might come before him/her in his/her capacity as such officer or employee.

Board members and administrators should also pay particular attention to the requirements of the code of ethics for local government officials and employees specified in section 19.59 of the state statutes when making purchasing decisions.

LOCAL PURCHASING POLICIES

Wisconsin school districts are implementing a variety of local purchasing policies and procedures. The following are only a few examples.

According to the *Wisconsin Rapids School District's* purchasing policy, the board encourages goods and services to be purchased locally insofar as is practical and in the best interest of the district. Local vendors are given preference if service, quality, delivery time, and price are comparable with other vendors. Goods and services must be equal to or exceed the requirements (award criteria) for price and quality as imposed upon other vendors.

Daniel Weigand, director of business services, said the district encourages local purchasing "to promote our local businesses and economy. We provide opportunity for local businesses while still allowing the district to get the best value."

This policy is not intended to be interpreted to bind the district to the purchasing of goods and services totally from local vendors. It is expected to be interpreted as a meaningful directive to those with the authority to make purchases to give full and complete consideration to local merchants.

Annually, the district publishes an advertisement in the local newspaper soliciting

local vendors interested in being added to the vendor list for bids, quotes and purchases. The district also lets the community and local vendors know about the policy on the district's Web site and upon request.

According to board policy, it is not the responsibility of the district or its agents to contact local vendors in each instance. Rather, it is the responsibility of the vendor to be sure his/her name is on record as being a purveyor of specific goods and/or services.

When quotation requests are prepared, they are mailed to all local vendors who express an interest in quoting, as well as other vendors as deemed appropriate. The board expects requests for quotes to be sent to at least three vendors whenever possible.

All district purchasing must be done through the Business Office, except as otherwise provided, in accordance with state statutes, accepted purchasing procedures, and ethical business practices.

All quotation awards are based on the "lowest priced responsible qualified supplier". Consideration is given to price, the quality of the product or service to be supplied, their conformity with the specifications, their suitability to the requirements of the educational system, the delivery terms, the past performance of vendors, vendor reliability and payment terms. Selection of a product or service for reasons other than price must be justified in writing and attached to the purchase order.

According to Weigand, "Local businesses have been competitive and frequently have had the low bid." Examples of goods and services purchased locally include electrical services, plumbing services, HVAC work, paper, milk, office supplies, printing, door hardware and vehicles.

The *Monroe Area Public School District* has a policy in place that requires purchases to be made locally when goods of equal quality are available from local suppliers at competitive prices. Although school district purchasing agents are not bound to purchase items locally

if the items can be secured at a savings from sources outside of the district, they are required to consider purchasing locally before purchasing from sources outside of the district.

The district follows the same bid and proposal procedures for all vendors. Purchases of single items in excess of \$10,000 require competitive quotes except as otherwise provided by the school board. Purchasers of single items costing more than \$500 but less than \$10,000, though not subject to district bidding requirements, are expected to nevertheless obtain and document on a purchase order, pricing information from at least one local source, if available. Sources may include telephone contacts, catalogue prices and published advertisements.

“Our policy is about ensuring opportunity for our local vendors. It serves as the starting point in the purchasing process, to emphasize the importance of supporting our local constituents as they support our school district,” according to Superintendent Larry Brown. “The district may pay a slight premium to support our local economy.”

Brown continued, “Our community understands that the school board makes this policy a priority, but also understands that the board will not make decisions that are not fiscally responsible or jeopardize the financial well being of the district.”

“There are some items that local vendors are unable to be competitive against larger state-wide or national companies, but there are only a few of these,” said Brown.

The ***Stevens Point Area School District*** also has a purchasing policy that encourages purchases to be made locally whenever possible. Jack Stoskopf, Jr., assistant superintendent for operations, said the district makes every effort to buy locally but also recognizes that it has to be a careful spender of the limited resources that are available.

“Significant savings from some vendors outside the local community cannot be avoided altogether - as some needs are not available for purchase in our community...If there is a product

or service that is not provided locally, most people understand that some of our money will be spent in other communities” said Stoskopf.

According to Stoskopf, the size of their community certainly increases their abilities to do a majority of their purchasing of both products and services locally. “The fact that many local businesses support our schools in many ways - both financially and with in-kind contributions has to be factored in the emphasis to purchase locally whenever we can.”

Purchases are determined by a comparison of price, quality and service provided by vendors for service and products. Where quality and service are relatively equal, price is the determining factor. District purchases are under the direction of the assistant superintendent for operations.

Stoskopf said most of the district’s mechanical, electrical and construction services are purchased through local vendors, the financial and student records software is purchased through a local vendor, and the district uses local farms as food vendors for the district’s lunch program. These are a few of the purchases that are made locally.

The ***School District of Hilbert*** has had a local purchasing policy for twenty years. According to policy, the district will give full consideration to local merchants in purchasing supplies, equipment and services, and will purchase locally when the supplies, equipment and services are available at the price and in the same quality, with the same assurance of service, which may be available from outside competitors. The district generally informs local merchants that opportunities are available to sell to the school district but the individual merchants are expected to solicit the school business.

Keeping in mind the district’s local purchasing policy, district purchasing decisions are made in accordance with the following procedures:

- In case of satisfactory tie quotes/bids, within-state quotes/bids will be chosen over out-of-state quotes/bids.

- In case of satisfactory tie quotes/bids, within-the-school district quotes/bids will be chosen over out-of-school district quotes/bids.

Refer to the section below for information on Hilbert’s local food purchasing program.

The *West Bend School District* has also had a long standing policy encouraging local purchasing. Local purchasing is favored whenever the following factors are equal between local and out-of-town suppliers:

1. Quality of the product
2. Price
3. Conformance to specifications
4. Convenience of delivery
5. Past service to the school district

The board reserves the right to pre qualify all bidders, agents or vendors, and to determine whether or not the designation as a local business is met. A “local business” is defined as one that maintains an office within the district boundaries and employs at least one full-time employee.

“Our district enjoys a long standing tradition of utilizing qualified local vendors for district expenditures. The district recognizes the importance of supporting our local businesses, especially during these difficult economic times... This policy is part of the district’s culture,” said Jeff Nennig, assistant superintendent of technology and operation.

Nennig said it is not uncommon at school board meetings, for board members to openly question the administration inquiring if the vendor of choice is local or if there were local vendors included as part of the purchasing process.

Recently, the West Bend community passed a 27.4 million dollar referendum project to rebuild the middle school. Nennig said the board directed the district’s owner representative to make certain that the construction firm managing the project award preference to local businesses or to contractors that employ 50% or more of their workforce who actually reside

within the district boundaries. The construction firm is responsible for providing monthly updates to the board that include information about local hiring.”

“While it is not always possible in specialized areas to retain local talent, the board expects that a significant amount of the project work will be completed from those who do reside in the district. The community supports the school district and the district supports the local businesses. The result is a win-win scenario for the entire community,” said Nennig.

FARM TO SCHOOL LOCAL FOOD PURCHASING

A growing number of Wisconsin school districts are becoming involved in the Farm to School Program, which includes purchasing fresh fruits, vegetables and other food items from local growers/producers. Additional information on that program and related resources can be found in the “*Policy Processes at Work*” section of this publication.

The *Chilton School District* and *School District of Hilbert* are actively engaged in local food purchasing through their Farm to School Program. Diane Chapeta, director of child nutrition services for both school districts, said, the goals of the program are to: (1) bring whole foods back into the lunch programs, increasing nutritional values, (2) promote proper nutrition and healthy eating, (3) reconnect students to the food cycle by introducing them to local agriculture, and (4) support the communities we live in.

Chapeta started the program two years ago after doing some research and receiving the commitment of the administration and school boards in both districts to move forward with the program. “It appeared to be a ‘win-win’ proposition to all of us, if handled correctly, and after nearly two years, I think I can say with confidence that it is,” said Chapeta.

Originally, Chapeta contacted the county extension agriculture department to obtain

names of growers in the local area and then advertised in the local newspapers for growers who were interested in participating in the program. She met with interested growers and informed them of the requirements for participation in the program, which include meeting food safety requirements for school nutrition programs.

“All schools follow HACCP (food safety plan) principles in the kitchens. Local purchasing does not fall outside this rule. If you have a HACCP plan in place, then you should be following proper food safety procedures concerning delivery, product quality, and further processing or handling of the product,” said Chapeta. The requirements are the same for every vendor.

To help ensure food safety, the districts conduct a farm site visit before approving a local grower/producer as a school district vendor. Chapeta said the inspection is done by the director of child nutrition services and a school administrator using a farm site checklist.

The farm site checklist was developed by Chapeta after reviewing Wisconsin’s Safe Farming Practices. “It covers safe farming practices from every aspect, including proper care of animals to biological and physical hazards. Many of the items are common sense, and many are tied to HACCP practices which school food service managers already are familiar with,” said Chapeta.

When touring the farm property, they:

- Ask growers/producers whether they are following Wisconsin Safe Farming Practices and if they are certified with the state, or working toward such certification.
- Ask produce growers to identify any insecticides, weed killer, etc. they use, provide the process they follow when applying such products, and show locked storage location of any such products they use.
- Ask produce growers about their postharvest handling practices. Is the product held in a

cooling unit? Is the storage facility secure?

Are the products washed before shipment?

- Ask produce growers/meat producers to describe their safe food handling procedures.
- Ask meat producers about the types of feed they use, and the treatment of the animals.
- Request a copy of the state license held by the butcher they are utilizing for the district file.
- Look for standing water, injured or diseased animals, animal carcasses, overloaded manure retention systems, and surface water runoff.
- Inspect delivery vehicles and note condition. Are they refrigerated? Clean and in good condition? Free of debris?
- Ask the farm partners if they would be interested in making classroom visits or allowing field trips to their facility. Investigate possibilities with foods classes, agriculture classes, etc. to tie in the Farm to School connection with the district.

If good farming practices are being followed, then the food source is accepted as a school district vendor and a purchasing agreement is drafted. If, however, the district has reservations concerning what practices are being utilized, then the district will refuse to purchase from that source. “The safety and health of students is paramount, and we will refuse to purchase from an unacceptable source,” said Chapeta.

Chapeta has made it part of her process to revisit farms after a full season of purchasing has ended, and the purchasing agreement is continued.

During the season, approved local growers/producers contact the director of child nutrition services (Chapeta) through email or by phone every week, listing the items they will be harvesting for Monday delivery, estimated yields and prices. “I receive notifications by Wednesday the prior week so as to have time to plan my purchases, and they can plan their delivery schedules. I return the contacts by Friday with my orders. This also works well with my ordering schedule for our prime food vendor. Items I

cannot get from the local farms are added to the Monday truck with my prime vendor. I make purchases based on what I can utilize and price quotes...I follow the same rules set down for purchasing, no matter whom I purchase from,” said Chapeta.

The Chilton and Hilbert school districts started their Farm to School program purchasing apples and produce from local growers and it has grown from there.

“It has been a natural progression,” said Chapeta, “Once we were successful with apples and produce, I began researching local beef, pork and cheese products. We are currently purchasing beef, and now pork, through a grass-fed livestock operation. I have connected with a second livestock operation in the Stockbridge area, and have hopes of bringing two more local school districts into the discussion. We are purchasing cheese from one local supplier, but will be adding a second supplier into the mix for catering needs. With each success, we move forward.”

The districts provide for regular monitoring and reviewing of the local food purchasing program, including costs, production and quality control, likes and dislikes of students, capabilities of school nutrition teams, and overall functionality of the program.

“Monitoring the key areas of the program will give you the information on how successful the changes have been. Problems can only be addressed, and corrections made if you are aware of successes and failures in all areas,” said Chapeta.

The school boards are updated regarding the local food purchasing program as requested, traditionally twice a year. According to Chapeta, “School administrators and school boards should be aware of the process being utilized in local purchasing and the end results of the program. They should be fully informed.”

The districts’ Farm to School programs have been effective and have accomplished their goals, according to Chapeta.

- (1) Whole foods are on the school menus every week and “nutritional values are the best

yet.”

- (2) The districts promote proper nutrition and healthy eating in the cafeteria, teach it in the classroom and educate schools and community groups.
- (3) Students now can “identify a real chicken breast, a baked potato and a bevy of other fruits and vegetables and tell you where they came from. Farming is back in vogue.”
- (4) “Funds are staying in the community, field trips to our farming partners are on an upswing, and the communities approve of our efforts. Our farm partners are proud to be a part of this project, and we’re grateful to have the opportunity to serve fresh, whole foods,” said Chapeta.

Chapeta offers school districts the following general suggestions in developing and implementing a similar local food purchasing program themselves:

1. Obtain the commitment of the school food service manager, the food service staff and the administration and the support of the school board.
2. Decide how and where you want to start. Know what your limits are financially. Chapeta says a district may want to start small, choosing one or two items to begin with.
3. Find growers and producers in your area. Communicate with the growers and producers you wish to buy from. Agree on all pertinent issues: delivery terms, payments, weekly pricing and availability, etc. Visit the farming sites for safe and unsafe farming practices. Write up a purchasing agreement. Keep communication open and follow through on issues and concerns immediately.
4. Work out production schedules for local items. Know and respect the limits

of your staff when considering labor and time management. Provide training and encouragement when making production changes.

According to Chapeta, “Our school nutrition teams work to improve expended time and function on the production floor. In other words, we ‘work smart’. Team input and innovation is encouraged throughout facilities and our team works together to reduce cost whenever possible. All our teams are cross-trained to do every job in the kitchen.”

“Retraining employees to handle fresh foods is not outside the parameters of the job. In fact, it is merely the next step in the current process we are undertaking to increase nutrition and wellness in our programs,” said Chapeta, “Reconnecting employees to the process, and teaching employees to ‘take ownership’ of their jobs are two important steps toward achieving these goals. Keeping employees focused on the positives, and collectively working toward solutions to any production (time) overages or cost issues you may encounter, will keep your teams moving forward.”

5. Promote the program from the inside out. “In other words, involve the students, staff and the community. This may sound like a lot of work but in the long run it is essential to your success,” said Chapeta.
6. Plan school meal menus utilizing locally purchased foods and don’t limit changes. “Do not make assumptions. Popular or common food items like carrots and apples will not be the only successful items. Don’t hide the beets in a cake or bar. Offer your students real foods in all their glory. Your success should be counted by the consumption of and recognition of whole foods, not what you ‘snuck in under

their noses’. Remember this is an opportunity to teach and encourage your students,” emphasized Chapeta.

7. Follow up on purchases and review. What went wrong? What went right? How can you make improvements, find needed funds to expand your program? Can you utilize your facilities, teaching staff, and school nutrition team members more efficiently? “Question everything,” said Chapeta, “find answers and solutions.”
8. Contact growers and producers at the end of the season. Review the previous season, plan for the next and look ahead.

While some districts may think they cannot afford to buy locally, Chapeta feels they cannot afford not to. “All local foods are not higher priced. Local apples and produce are cheaper, and the quality is better than items purchased from other states and other countries. When you buy seasonally you are purchasing foods at the peak of their production, and at the best price.”

“Consistent food quality, friendly service, fresh foods, and local purchasing all help keep our school lunch program participation numbers up and our income steady,” said Chapeta.

The *Viroqua School District* has been participating in a local food purchasing program for 20+ years. According to Marilyn Volden, district food services supervisor, the district started buying apples from local growers and then expanded the program through the years. Two years ago, the district started processing local vegetables and freezing them for use throughout the entire school year.

In August 2008, the district purchased 700 pounds of fresh local produce and brought school food service staff into the kitchen to prep the vegetables, roast and freeze them before school started. Volden said they froze the “Ratatouille” and then used it in menus and recipes throughout the school year. This school year, the district expanded the processing. They purchased 1,000 pounds of local vegetables,

processed and froze them into “Ratatouille”, shredded vegetables for harvest muffins, and chopped vegetables for soup mix.

“We are able to utilize second quality veggies for our processing so we are able to keep costs in line. Also, August is a time of abundant veggies so we get a good price then.”

The district sends out a request for proposal (RFP) to local growers/producers annually for the purchase of local fruits and vegetables for the school year. The RFP outlines the terms, conditions and requirements for providing produce to the district, including food safety requirements and protocols. Also included in the RFP is a vendor questionnaire and a spreadsheet for identifying produce availability and pricing.

The vendor questionnaire includes questions related to produce delivery, liability insurance, other local customer contact information, payment terms and expectations, pest management practices, facility/farm inspection information, credit/return policy for poor quality produce, and availability of the producer and the facility/farm for school educational program activities.

“All local growers/producers have an equal opportunity to provide produce and services to the district. We buy only what meets our requirements and fits within our budget,” said Volden.

To help local growers/producers understand federal child nutrition program regulations and limitations, including Good Agriculture Practices (GAP) and Good Handling Practices (GHP), the district has provided training sessions for growers/producers taught by USDA trainers.

“We didn’t have a lot of farmers participating last year since it was held in April but this year the trainings will be held earlier (January and February) so we hope to have better participation,” said Volden.

Also, like Chilton and Hilbert, the district visits farms to inspect the facilities and fields prior to approval of local producers/growers as school district vendors.

The district informs the community about its Farm to School local food purchasing program through the local media - radio, television and newspaper. In addition, a documentary was filmed on the district’s Farm to School Program entitled “Food for Thought” and it was aired on HDNet in December. It is available to download from iTunes.

Volden said the district decided to pursue a Farm to School local food purchasing program to support local producers and businesses, improve community relationships and improve the quality of school food service programs. “The school board is very supportive of the program and it has had a very positive impact. It has been good for everyone - students, school, local businesses, producers and the community,” said Volden.

According to Board Member Vicki Koppa, the program allows the district to bring healthier foods to students and supports the local economy. It is also very cost effective. “We needed to put some money into it to fund certain program initiatives such as the purchase of equipment, but the program is operating in the ‘black,’” said Koppa.



DEVELOPING AND IMPLEMENTING A FARM TO SCHOOL PROGRAM

Farm to School programs are being initiated around Wisconsin and the country to increase student access to local fruits and vegetables, meats and dairy products in the schools; improve student nutrition; help students understand where their food comes from and how their food choices affect their bodies, environment and community; and, to support local farms by creating additional markets for their products.

Farm to School activities vary from district to district. Examples of such activities are:

- Featuring local foods in school lunch, breakfast and snack programs and at special school events
- Connecting school gardens and garden-based-learning activities to the curriculum
- Planning nutrition education activities, such as Harvest of the Month and food tastings, featuring local foods
- Using local foods as a healthy school fundraiser
- Organizing agriculture education opportunities such as field trips to gardens and farms or farmer presentations in the classroom

Some challenges school districts may face in starting or sustaining Farm to School programs are time, food supply (volume, variety, quality, consistency and seasonality), food distribution (ordering and delivery), finding growers, and price.

There are a number of Web site resources that may be helpful to school officials when developing and implementing Farm to School programs and activities, including the following:

- **Wisconsin Department of Public Instruction** (<http://dpi.wi.gov/fns/ffvpwigr.html>), which includes Wisconsin grower information and school resources
- **REAP Wisconsin** (<http://www.reapfoodgroup.org/>), which includes producer listings, food safety guidance, tips on creating successful purchasing relationships with local producers, etc.
- **Farm Fresh Atlases of Wisconsin** (www.farmfreshatlas.org), which lists growers and producers, farmer markets and special events in areas around the state
- **University of Wisconsin Cooperative Extension** (<http://www.uwex.edu/ces/>)
- Find your county extension office at the above Web site or call your regional office. They have information on local foods, community gardens, how best to reach area farms or connect to market managers, etc.
- **Wisconsin Homegrown Lunch** (<http://www.reapfoodgroup.org/farmtoschool/foodservice.shtml>), which includes resources for school food services

Also, the **Northeast Wisconsin (N.E.W.) Farm to School Initiative** offers assistance to growers and schools alike wishing to learn more about the Farm to School Program. The initiative was formed in and operates out of the director of child nutrition programs' office in the Chilton School District. Contact Diane Chapeta for information via email at dchapeta@chilton.k12.wi.us.

According to Chapeta, N.E.W. coordinator, "Farm to School has a positive effect on Wisconsin communities, as well as the nutrition of our school-age children. N.E.W. believes in a return to eating and providing whole foods grown locally, and teaching students to 'eat for life'. It is apparent that this change is needed now more than ever."



POLICY SERVICES

122 W. Washington Avenue, Suite 400
Madison, WI 53703

WASB Code: **672.2**

EPS Code: **DJD**

LOCAL PURCHASING

In so far as is practical and in the best interests of the district, materials and services are to be ordered from local vendors when possible. However, it must be understood that such materials and services must be equal to or exceed the requirements for price and quality as imposed upon other vendors.

It shall not be the responsibility of the district or its agents to contact local vendors in each instance. Rather it shall be the responsibility of the vendor to be certain that his/her name is on record as being a purveyor of specific services and/or goods so that if the need for such arises, contact can be made with him/her. Notice of this responsibility shall be published each year prior to the start of the school year and all vendors shall have 30 days to register with the district office. Such registration shall include the name of the vendor, his/her address and telephone number, and a listing of the materials/services which he/she may be able to supply.

Failure to register within the specified time limit could result in a vendor being inadvertently overlooked in the search for services or material. Therefore, while the time limitations are not truly restrictive, failure to abide by them could be detrimental to the vendor.

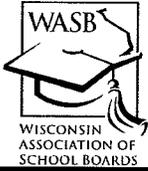
This policy shall in no way be interpreted to bind the district to the purchasing of services or goods totally from local vendors, however, it shall be interpreted as a meaningful directive to those with the authority to make purchases to give full and complete consideration to local vendors.

This policy is adopted with the knowledge of the fact that local vendors are in business in the same manner as are other purveyors of services or goods and, in addition, support the district with tax monies as do other citizens.

SOURCE: WESTBY AREA SCHOOL DISTRICT

REVISED: January 14, 2008

**Sample policies are distributed for demonstration purposes only.
Unless so noted, contents do not necessarily reflect official policies of the WASB.**



POLICY SERVICES

122 W. Washington Avenue, Suite 400
Madison, WI 53703

WASB Code: **672.2**

EPS Code: **DJD**

LOCAL PURCHASING

The District shall purchase locally when goods of equal quality are available from local suppliers at competitive prices.

Although purchasers are not bound to purchase items locally if the items can be secured at a savings from sources outside of the District, purchasers should consider purchasing locally before purchasing from sources outside of the District.

Purchasers of single items costing more than \$500 but less than \$10,000, though not subject to the bidding requirements of the District's general purchasing policy, should nevertheless obtain and document on purchase order pricing information from at least one local source, if available. Sources may include telephone contacts, catalogue prices and published advertisements.

SOURCE: MONROE AREA PUBLIC SCHOOL DISTRICT

APPROVED: October 29, 2007

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POLICY SERVICES

122 W. Washington Avenue, Suite 400
Madison, WI 53703

WASB Code: **672.2**

EPS Code: **DJD**

LOCAL PURCHASING

The District shall cooperate with local merchants. Local firms, businesses or vendors supplying equipment and materials at equal cost and quality and who can provide satisfactory service for maintenance, repair and guarantee of the product, payment terms, promptness of delivery and dependability of the supplier, will be given preference when purchases are made.

SOURCE: ELMBROOK SCHOOL DISTRICT

RECONFIRMED: October 2007

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POLICY SERVICES

122 W. Washington Avenue, Suite 400
Madison, WI 53703

WASB Code: 672.2

EPS Code: DJD

LOCAL PURCHASING

Local purchasing will be favored whenever the following factors are equal between local and non-local vendors:

1. Quality of product
2. Suitability of product
3. Price
4. Conformance to specifications
5. Convenience of delivery
6. General reputation of business firms
7. Past services to school district

SOURCE: WATERTOWN UNIFIED SCHOOL DISTRICT

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POLICY SERVICES

122 W. Washington Avenue, Suite 400
Madison, WI 53703

WASB Code: **672.2**

EPS Code: **DJD**

LOCAL PURCHASING

Because local merchants are in business in the same manner as are other purveyors of goods and/or services and because they support the school district with tax monies as do other citizens, the Board hereby issues the following directive in reference to the purchase of goods and services.

In so far as is practical and in the best interests of the school district, materials and services are to be ordered from local merchants when possible. However, it must be understood that such materials and services must be equal to or exceed the requirements for price and quality as imposed upon other vendors.

This policy shall in no way be interpreted to bind the school district to the purchasing of goods and services totally from local vendors. However, it shall be interpreted as a meaningful directive to those with purchasing authority to give full and complete consideration to local merchants.

SOURCE: SUN PRAIRIE AREA SCHOOL DISTRICT

APPROVED: April 25, 2005

**Sample policies are distributed for demonstration purposes only.
Unless so noted, contents do not necessarily reflect official policies of the WASB.**