

## Guidelines for Procurement



It is important to remember that GEAR UP funds are taxpayer monies. All expenditures must pass the following test: *allowable, allocable* and *reasonable* to ensure the purchase is perceived as a good use of taxpayer dollars and in compliance with state and federal guidelines.

Listed below are the Procurement Guidelines:

<b>GEAR UP Iowa Procurement Guidelines</b>	
Topic	Points to Consider
State Procurement Rules	<ul style="list-style-type: none"> <li>• Procurement purchases must receive approval prior to expenditure                             <ul style="list-style-type: none"> <li>○ “Goods” (example: technology, furniture, equipment)</li> <li>○ “Services” (example: consultants, contracts)</li> <li>○ Small and reoccurring purchases do <b>not</b> need to be pre-approved (example: school supplies, snacks)</li> <li>○ Gift Cards <i>are not allowable</i> per Iowa Code                                     <ul style="list-style-type: none"> <li>➢ <b>Goods/Services under \$10,000:</b> <ul style="list-style-type: none"> <li>▪ Schools will need to seek 3 bids or quotes from vendors   <ul style="list-style-type: none"> <li>○ Schools may contact vendors directly and request a quote</li> <li>○ School may be able to find pricing information for goods online</li> </ul> </li> <li>▪ The bids need to compare like items to make sure the bids are as accurate as possible</li> </ul> </li> <li>➢ <b>Goods/Services between \$10,000 and \$50,000:</b> <ul style="list-style-type: none"> <li>▪ Follow the same process as above</li> <li>▪ May be required to choose the lowest bid (depending on the item(s) purchased)</li> </ul> </li> <li>➢ <b>Goods/Services over \$50,000:</b> <ul style="list-style-type: none"> <li>▪ Items over this amount will need to adhere to a formal process</li> <li>▪ Schools must seek 3 bids</li> <li>▪ GEAR UP Iowa Accounting will select the vendor to award</li> </ul> </li> </ul> </li> </ul> </li> <li>• Send pre-approval request(s) and supporting documentation to the GEAR UP Project Coordinator</li> </ul>
Exceptions	<ul style="list-style-type: none"> <li>• Contact GEAR UP Project Coordinator to ask if the situation warrants an exception</li> <li>• Common exceptions to the Procurement Policy include:                             <ul style="list-style-type: none"> <li>○ The School/District holds an existing contract or agreement with the vendor</li> <li>○ There is only one option for a vendor</li> <li>○ Other situations may apply as determined by GEAR UP Project Coordinator</li> </ul> </li> <li>• Districts may submit Exception Explanations by the following routes:                             <ul style="list-style-type: none"> <li>○ Email to GEAR UP Project Coordinator</li> <li>○ Written legibly on the quote, signed and dated</li> <li>○ Attached to quote on a separate page, signed and dated</li> </ul> </li> </ul>

**\*\* Under NO circumstances may Federal Funds be used to pay for entertainment to include amusement, diversion or social activities. \*\***