

## **Procurement Policy Checklist**

- \_\_\_ School has established a clear conflict of interest policy regarding the procurement of goods or services that prohibits any employee, officer, or agent from participating in the selection, award, or administration of a contract if a real or apparent conflict of interest would be involved. A conflict of interest would arise when the employee, officer, or agent, any member of his immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for the award (EDGAR, § 74.42).
- \_\_\_ Grant recipients do not purchase unnecessary items;
- \_\_\_ Analysis is conducted to show lease and purchase alternatives to determine what is the most economical and practical;

### Solicitations for goods and services include:

- \_\_\_ Clear and accurate descriptions of the material, product, or service to be procured without unnecessary requirements which unduly restrict competition.
- \_\_\_ Descriptions of any technical requirements.
- \_\_\_ Specific features of brand name or equivalent descriptions that bidders must meet.
- \_\_\_ Business or contractor selection process considers ability to perform to the fullest extent possible and can include contractor integrity, records of past performance, and financial and technical resources or access to such resources.
- \_\_\_ School clearly documents all bids received and conducts a price comparison analysis.

### Potential Red Flags:

- School does not have clear written procurement processes.
- School makes purchases based on only one bid or estimate.
- Purchases require brand name and they exceed small purchase threshold.
- Awards exceeding small threshold go to firm other than apparent low bidder under a sealed procurement process.
- Charter school management company makes all purchases without board or school leadership involvement.