



LAKE WALES
CHARTER SCHOOLS

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lwcharterschools.com

To: Principals

From: Alricky Smith

Date: October 17, 2024

Subject: Changes in Procurement Policy (Revised)

INTERIM
SUPERINTENDENT
Alricky Smith, CPA

Lake Wales Charter Schools recently have been engaged in audits and monitoring engagements. Each engagement has identified a weakness in the procurement practices.

BOARD OF TRUSTEES

Purchases within these categories must comply with the following steps before the transaction is approved.

Chair
Danny Gill

Category 1: The aggregate dollar amount up to \$4,999 are considered micro-purchases. A micro-purchase is the acquisition of supplies or services & may be made without soliciting competitive quotations if the Superintendent/CFO considers the price to be reasonable. The System maintains evidence of this reasonableness in the records of all purchases made by this method.

Vice Chair
Rafael Unzueta

Category 2: Purchases of \$5,000- \$10,000 require three quotes.

Brian Marbutt
Dr. Michael Flood
Andy Blair
Tonya Stewart
Dr. Lori Hutto
Dr. Lynn Johnson

Category 3: Purchases of \$10,001-\$35,000 require competitive negotiation & a detailed cost analysis.

Category 4: Purchases of \$35,001-\$50,000 require a public announcement.

Treasurer
Alricky Smith, CPA

Category 5: Purchases of \$50,001-\$100,000 require Board Approval.

Category 6: Purchases that exceed \$100,001 require a sealed bid process.

Corporate Secretary
Marie Cherrington-Gray

Please submit the original documents to the Central Office for record retention for transactions that fall in the amounts in categories 2 through 5.

If you have any questions, please do not hesitate to contact Mellissa Ard at Mellissa.Ard@lwcharterschools.com.

The mission of Lake Wales Charter Schools, Inc. is to bring the best of public education to our community by providing innovation and choice within a continuous pre-school through postsecondary curriculum so that each child recognizes the benefits of life-long learning, constructive citizenship and personal happiness.

AS/MA

cc: Lake Wales Charter Schools Finance Secretaries
Angela Heyward, Director of Federal Programs
David Waldrop, Coordinator of Admin Technology
Jennifer Barrow, Director of ESE
LaQuanda Burroughs, Director of Human Resources
Marcia Rose, Director of Health Services

The Lake Wales Charter Schools, Inc. is an equal opportunity institution for education and employment.