

PROCUREMENT 101



Purchasing Department

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Director

PURPOSE

To provide potential vendors with a brief overview of the rules, regulations, and procedures governing the Caddo Parish School Board's procurement processes.



VENDOR OBJECTIVES

- ❖ Be able to locate solicitations relevant to your business.
- ❖ Be able to gain access to those solicitations through various sources.
- ❖ Identify and avoid any pitfalls associated with the solicitation process.
- ❖ Be pro-active in trouble-shooting any issues that may arise during the solicitation process.
- ❖ Accurately complete any solicitation your business desires to compete in.



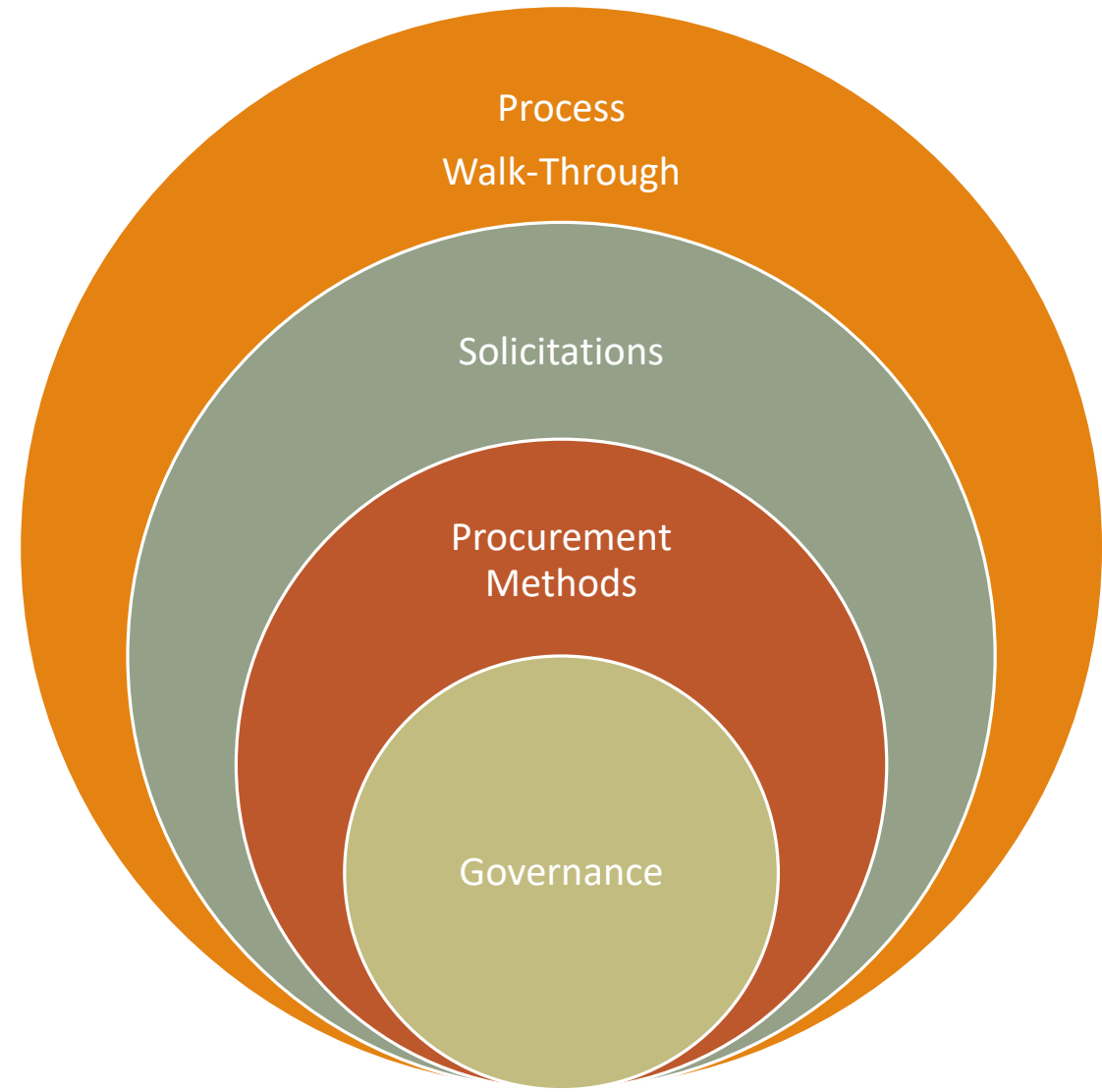
TOPICS

Governance

Procurement Methods

Solicitations

Process Walk-Through



Governance

FEDERAL

US Office of Management & Budget (OMB)

2 CFR 200.318

Uniform Administrative Requirements, Cost Principles & Audit Requirements for Federal Awards

STATE

Louisiana Revised Statute 38: Procurement code for non-state agencies within the State of Louisiana

RS 38:2211-2296

Public Contracts

RS 39:1481-1526

Professional Services

RS 39:1761

Lease/Purchase

Louisiana Administrative Code (LAC) 34, Part 1

LAC 34:V.1709

LaPS Rule

Small Purchase Executive Order

Governance

DISTRICT

CPSB Policy

Policy DFK	Sale of Surplus Equipment & Supplies
Policy DFL	Sale of Buildings and Land
Policy DJE	Definitions & Operations
Policy DJEAA	Procurement Cards
Policy DJED	Bids & Quotations

CPSB Procurement Methods

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Micro Purchases	<\$10,000 No competitive process required	<\$1,000 No competitive process required	<\$10,000 No competitive process required	Follow most restrictive
Small Purchases	\$10,000-\$250,000	\$1,000-\$10,000 3 or more quotes suggested but not required	<\$10,000 No competitive process required	Follow most restrictive
		\$10,000-\$30,000 3 or more quotes	\$10,000-\$20,000 Solicit 3 or more quotes	
			\$20,000-\$30,000 Solicit 5 or more quotes	
Sealed Bids (Formal Advertising)	>\$250,000 Publicly bid and awarded to lowest responsible bidder	M & S >\$30,000 Public Works >\$250,000 Publicly bid and awarded to lowest responsible bidder	>\$30,000 See LPC (R.S. 39:1551-1736)	Follow most restrictive

CPSB Procurement Methods

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39
Competitive Proposals	>\$250,000 Request for Proposal from adequate number of sources, must have written method for selecting recipients.	M & S >\$30,000 Public Works >\$250,000 Publicly bid awarded to lowest responsible bidder	>\$30,000 See LPC (R.S. 39:1551-1736)

Noncompetitive Proposals- Sole Source Purchases	Sole Source purchases are appropriate only under the circumstances listed below and must have written documentation.		
	1. The item procured is only available from a single source, or		
	2. The purchase is in response to a public emergency that will not permit delay resulting from the competitive process, or		
	3. The purchase is expressly authorized by awarding or pass-through agency in response from the School Board, or		
	4. After soliciting a number of sources competition is deemed inadequate		

Solicitations

Type of Solicitation	Requirements	
Quote-phone, fax, or email	No requirement Usually 3 quotes Immediate-short turn around	Basic documentation on pricing. May be formal or informal; level of documentation based on complexity and/or dollar amount. Does not go before the Board for approval.
Request for Bid Formal	Advertised in official journal Minimum of 15-21 days turn around	Public opening and reading with tab sheet. Typically a low bid award. Board approval necessary for official award.
Request for Proposal	Advertised in official journal Minimum of 30 days turn around due to complexity	Public opening. Typically graded on pre-determined rubric by committee. Board approval necessary for official award.

Solicitations

SUBMISSION REQUIREMENTS

Type of Solicitations	Phone	Fax	Email	Hand Delivery	Electronic (Bid Express)	U.S. Mail
Quote-Informal	✓	✓	✓	✓		
Quote-Formal	✓	✓	✓	✓		
RFB (IFB)-Single Use				✓	✓	✓
RFB (IFB)-Contract				✓	✓	✓
RFP (Service or Solution)				✓	✓	✓

Solicitations

OPENING TIME & DAY(S)

Formal Bids

- Purchasing Department bids are opened at 10:30am CST or sometime thereafter on Tuesdays and Thursdays
- Bids are opened in the Purchasing Department, unless otherwise notified

Note: Any bids submitted after the 10:30am CST deadline will not be accepted. NO EXCEPTIONS!

ELECTRONIC SUBMISSION

Website: www.bidexpress.com

- Solicitations can be viewed at no cost
- Vendors registered with bid express can be notified of advertised bids applicable to their business-type (ex. roofing, landscaping, office supplies, etc.)
- Subject to the 10:30am CST submission deadline

Process Walk-Through

1. District staff identifies a need
2. Staff submits a request to the Purchasing office using a purchase requisition (PR)
 - a. Requisition created to encumber funds for purchase approvals by budget fund administrators
3. Purchasing Department determines if a solicitation is necessary or required
 - a. If solicitation is not required, a purchase order can be processed
 - b. If solicitation is required, purchasing staff should determine the appropriate solicitation method (ex. formal quote, informal quote, IFB/RFB, or RFP)
4. The following information is used when determining the type of solicitation method:
 - a. Dollar amount
 - b. Complexity of purchase
 - c. Quantity of items being ordered
 - d. M & S vs. Service
 - e. Other...(emergency situation)

Process Walk-Through

5. Purchasing Department begins the solicitation process

Solicitation	Timeframe	Requires Board Approval	Dollar Limit
Quotes	3-5 days	No, immediate award	Max. \$30K
IFB/RFB	15-21 days	Yes	Over \$30K
RFP	30 days	Yes (service may or may not go before the Board)	Varies

6. Purchasing Department completes the solicitation process and submits solicitation results to the Board for approval

7. After Board Approval one or more of the following occurs

- a. Award Notification Letter Prepared
- b. Negotiate and Sign Contract
- c. Issue Purchase Order

Process Walk-Through

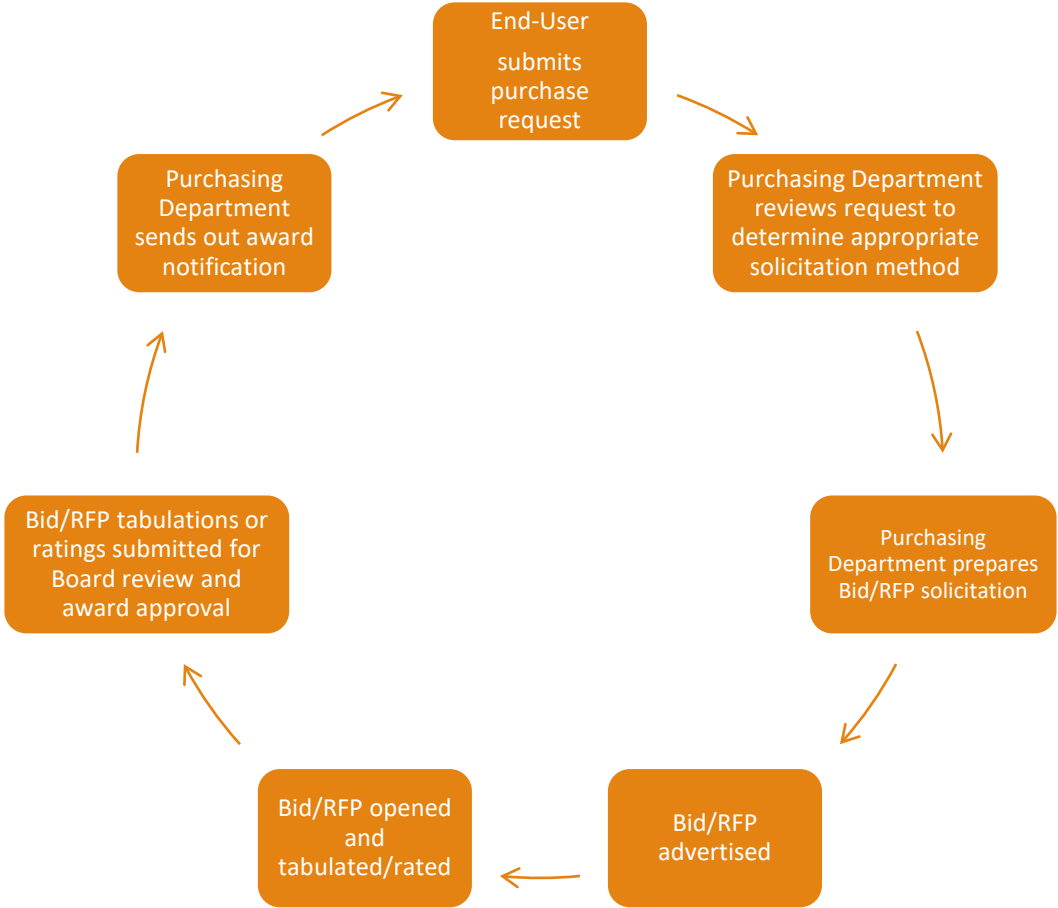
Types of Awards

Single-Use

Catalog Contract (% off contract)

Term -Contract

Bid/RFP Process Walk-Through



Purchasing Staff

Scott Sullivan

Chief Buyer

Shari Foreman

Senior Buyer

Marguerite Roberson

Buyer Assistant

Shelia Jones

Buyer Assistant

Caddo Parish School Board
1961 Midway Avenue
Shreveport, LA 711108

Telephone: 318.603.6481

Fax: 318.603.6474

Email: purchasing@caddoschools.org

Website:

<https://www.caddoschools.org/caddo-schools-purchasing-department>

MEETING DATES & TIMES

Board Work Session 1st Tuesday of the Month

Board Meeting 3rd Tuesday of the Month

(Exceptions are made to accommodate holidays, breaks, and other scheduling concerns)

Board meetings begin at 4:30pm, unless otherwise notified.