

# Procurement 101 for Administrators

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PRESENTED BY: THE DEPARTMENT OF PURCHASING

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# Objectives

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Basic understanding of the bid laws that govern our procurement processes.

Understanding CPSB Procurement policy.

Rights & Responsibilities as a Fund administrator

Sungard and Business+

Practical application

# Procurement

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The process associated with obtaining materials, supplies and services through a competitive methodology.

# Purchasing

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Make sure you get the right product, at the right time, and at the best price.

Make sure that the requisite laws are followed in making those purchases.

Promote competition

# LA RS 38:2212 Title 38

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Governs quasi-state organization

Details the do's and don'ts

Details bid limits

Bid parameters

# Bid Requirements

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## **Bid limits**

- Materials and Supplies-\$30,000
- Public Works-\$250,000

## **Time Requirements for Advertising**

- Material and Supply bids (IFB)-15 days
- Request for Proposals (RFP)-30 days
- Public Works- Minimum 25 days

# Procurement Methods:

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Micro Purchases	<\$10,000 No competitive process required	<\$1000 No competitive process required	<\$10,000 No competitive process required	Follow most restrictive
Small Purchases (informal)	\$10,000- \$250,000 Price or rate quotation from qualified sources	\$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

# Procurement Methods:

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

Noncompetitive Proposals – Sole Source Purchases	Sole source purchases are appropriate only under the circumstances listed below and must be documented.
	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 competitive process; or
	3. The purchase is expressly authorized by awarding or pass-through agency in response to written request from the School Board; or
	4. After soliciting a number of sources competition is deemed inadequate. Process must be adequately documented



# BusinessPlus & Approving Orders

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Each log-in is specific to each user.

Things to check for when approving orders:

- The right vendor

- Shipping to the right location

- The right items, quantity and reasonable pricing

- The right account number

# Checking on your order – in Business +

**BusinessPlus** Purchase Requests (POUPPR)

**Search**

**Filters:**

- POs Only
- POCSAD\_Filter
- POCSHR\_Filter
- PRUPPO\_Filter
- POUPPR\_Filter

**Search Criteria:**

**+**

PR Number\*:  PO Number:  Status\*:  Security Code:

Approval Code:  Requested By:  Date Requested:

PO Total:  PR Total:

Vendor ID:  Vendor Name:

Vendor Addr Code:  Remit To ID:

Phone Cd:  Remit To Addr Code:

Phone Cd:

# Checking on your order – in Business +

The screenshot displays the BusinessPlus interface for Purchase Requests (POUPPR). On the left, there is a navigation sidebar with icons for search, home, and other functions. The main area is divided into two sections: 'Approvals' and 'Purchase Requests (POUPPR)'. The 'Approvals' section shows a list of pending and future requests with buttons for 'Approve', 'Reject', 'Hold', and 'Forward'. The 'Purchase Requests (POUPPR)' section shows a table of records with columns for PR Number, PO Number, Vendor ID, Vendor Name, and Status. The first record is highlighted, showing PR Number PRI34428, Vendor ID V004711, and Vendor Name Ferris Office Smart LLC. Below the table, there are navigation controls and a 'Switch to Added Records' button.

**BusinessPlus** Purchase Requests (POUPPR)

**Approvals**

Purchase Doc... ▾

- Pending**  
Shavonda Scott  
Group:  
Since: 09/29/21 11:18:20  
On: 12/31/50 00:00:00
- Future**  
Group: Purchasing Department
- Future**  
Group: Dir - Purchasing Department
- Future**  
Group: Office Supplies, Forms

[Link to Task List](#)

PR Number	PO Number	Vendor ID	Vendor Name	Status
PRI34428		V004711	Ferris Office Smart LLC	PR

1 - 1 of 1 Records

Items Notes

Item Number
0001

1 - 1 of 1 Records

# Procurement Tools

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CPSB Bid List

Quick Quote Form

BusinessPlus Reports

Procurement IQ Reporting

Purchasing Staff

# A few other things . . .

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Security Code Access – New and/or transferring employees must have security code access to use Business Plus.

Training-Supervisor's should email Purchasing staff to schedule BusinessPlus training for new employees or first users.

Sharing Purchases- Departmental and Finance approvals must be obtained prior to splitting a purchase across different departmental accounts.

# We're here to help

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