

PURCHASING HANDBOOK



NEW ORLEANS PUBLIC SCHOOLS PURCHASING DEPARTMENT OPERATION PROFILE

Revised January 17, 2012

**Leslie J. Rey
Purchasing/Ancillary Services Director**

**Lynn Dillon
Senior Buyer**

**Purchasing Department
Orleans Parish School Board
3520 General DeGaulle Drive
New Orleans, LA 70114**

**Telephone (504) 304-5645
Fax (504) 309-2879
leslie_rey@nops.k12.la.us**

TABLE OF CONTENTS

Introduction.....	Page 3
Purchasing Guidelines	Page 4
Bids and Quotations.....	Pages 4-6
State Contract Purchases	Page 7
Emergency Procurement.....	Page 8
Contracts – Supplier Performance Review	Page 9
 Appendices:	
A – PO Process Flow.....	Page 10
B – OPSB Contract for Professional Services (available on OPSB website).....	Pages 11-15
C – OPSB Professional Services Billing Form (available on OPSB website)	Page 16
D – Tips for Drafting Specifications for Bid Packages.....	Pages 17-18
E – Contractor Evaluation Form.....	Pages 19-20
Requisition Checklists	Page 21-23
Purchasing Schedule.....	Page 24

Introduction

As stewards of public funds from Federal, State and Local taxpayers, you have a fiduciary responsibility to spend these funds in an efficient, effective and proper manner. That responsibility requires compliance with all Federal, State and Local policies and legal statutes. To that end, this guide has been developed to provide you with standard purchasing procedures, assistance in the preparation of forms and general information. Failure to comply with these policies and procedures will result in disciplinary actions.

The Purchasing Department has been given authority to conduct and conclude negotiations for the purchase or lease of all supplies, equipment and services to fulfill the requirements of the district. Purchasing is responsible to procure all goods and services in a fair, competitive, and equitable basis, without undue delay, in accordance with the District's procurement policies. The authority for purchasing is delegated by the Orleans Parish School Board through the Superintendent, who in turn, has assigned purchasing responsibility to the Purchasing/Ancillary Services Director, and the purchasing staff.

The mission of the district's Purchasing Department is to develop and implement sound procurement practices in accordance with executive policy, district mandates, legislative statutes, and to provide quality and timely services to the school, departmental and vendor constituencies. In keeping with our mission, we offer this document as basic information designed to assist you in following purchasing guidelines as well as a source to enable you to prepare and process purchasing documents. This was developed for uses as a working tool. Since the world of procurement is ever changing, updates to the document will be forwarded to you from time to time.

The primary objective of the Purchasing department is to process requisitions, generate Purchase Orders, and service bids to allow teachers, principals and department heads not to be encumbered with the procurement process. Said differently, schools and departments identify and communicate the need/request to Purchasing; Purchasing delivers on the need/request in a timely manner.

The Purchasing Staff operational functions include:

- Purchase, rent or lease of all goods and services that are required by schools, departments and the administration;
- Maintain good relationships and provide timely feedback with all suppliers. Procure all goods and services on a fair, competitive and equitable basis.
- Comply with all Board policies, state and local laws pertaining to the procurement of all supplies, equipment and services. A vendor may not ship any goods or perform any services unless authorized by the Orleans Parish School Board; that authorization is manifested by a Purchase Order issued by the Orleans Parish School Board. No Purchase Order = no authorization.

Purchasing Guidelines

The Purchasing process begins with the school or department identifying the need. That need is then transformed into a requisition. If funds are available in the respective Budget (i.e. General Fund, Special Revenue – Title I, IDEA, etc, Capital Projects Fund, etc.), the requisition travels through a gauntlet of authorizations. Once the requisition has traveled through the authorization/approval process, the Purchasing department reviews the requisition and proceeds with identifying the proper vendor. Once the vendor has been found, Purchasing generates a Purchase Order which obligates funds of the district to said vendor for goods and/or services.

Authorization/Approval Process for Requisitions/Purchases

- Up to \$1,500.00 – Principals, Program Directors, Managers, Supervisors
- Up to \$7,500.00 – Assistant Superintendent, Department Heads
- Up to \$100,000.00 – Superintendent and Chief Financial Officer, Operations and Administration
- All requisitions involving the purchase of computers, peripherals, and any technological equipment require the approval of the Information Technology Director, or designee at any dollar amount level.
- Any purchase over \$100,000 requires the approval of the Orleans Parish School Board.

Bids and Quotations

Materials and Supplies

All purchases of materials or supplies exceeding the sum of \$30,000 to be paid out of public funds shall be advertised and let by contract to the lowest responsible bidder who has bid according to the specifications as advertised. In addition, purchases of materials or supplies of at least \$10,000, but not more than \$30,000, shall be made by obtaining not less than three (3) telephone or facsimile quotations. A written confirmation of the accepted offer shall be obtained and made a part of the purchase file. The Board may require a written contract or bond when purchasing the materials or supplies. If quotations are received that are lower than the quote accepted, a notation shall be entered into the file as to the reasons for rejection of the lower quotes.

Purchases cannot be divided by departments or by a school if the effect is to evade the state's public bid law. Purchases of commodities that are bought in small but recurring amounts through the year shall be bid on an annual basis.

Services

Non-Competitive Service Contracts:

The following service contracts may be awarded without the necessity of competitive bidding or competitive negotiation:

1. Consulting Services and Professional Services under \$50,000;
2. Personal Services; and

3. Cooperative Endeavor Agreements.

Cost for the full duration of the project/initiative must be considered when determining the total cost of a particular service.

Competitive Service Contracts:

Consulting services and professional services of \$50,000 or more are subject to competitive negotiation via a Request for Proposal (RFP) as required by Division of Administration, OCR "Regulations for the Procurement of Personal, Professional, Consulting and Social Services."

Exemptions: The following professional services are exempt from the requirement of competitive negotiation even if they exceed \$50,000: lawyers, doctors, architects, dentists, veterinarians, engineers, landscape architects and accountants.

Public Works

The Orleans Parish School Board shall advertise and let by contract, except in cases of emergencies as provided below, all public work exceeding \$150,000 or such sum as allowed by law, including labor, materials, equipment, and administrative overhead not to exceed fifteen percent (15%). The contract shall be awarded to the lowest responsible bidder who has bid according to the contract, plans, and specifications advertised. Public works which are estimated to cost less than the contract limit may be undertaken by the Board with its own employees.

As an evidence of good faith of the bidder, the Board shall require bidders for construction, improvement, repair, or other work to attach to the bid submitted, a bid bond, certified check, or cashier's check for not more than five percent (5%) of the contract work to be done. The Board may require a bid bond or certified or cashier's check of not more than five percent (5%) of the estimated price on bids taken for supplies and materials.

When any bid is accepted for construction or doing any public works, a written contract shall be entered into by the successful bidder and the School Board, and the successful bidder shall furnish a bond in an amount not less than one-half of the amount of the contract, for the faithful performance of his or her duties.

Under no circumstances shall there be a division or separation of any public work project into smaller projects, which division or separation would have the effect of avoiding the requirement that public work be advertised and let by contract to the lowest responsible bidder in accordance with statutory provisions.

Cost Reasonableness

A cost may be considered reasonable if the nature of the goods or services acquired or applied, and the amount involved therefore, reflect the action that a prudent person would have taken under circumstances prevailing at the time the decision to incur the cost was made. Major considerations involved in the determination of the reasonableness of a cost are:

- a. whether or not the cost is of a type generally recognized as necessary for the.....performance of the sponsored agreement;

- b. the restraints or requirements imposed by such factors as arm's-length bargaining, Federal and State laws and regulations, and sponsored agreement terms and conditions;
- c. whether or not the individuals concerned acted with due prudence in the circumstances, considering their responsibilities to the institution, its employees, its students, the Federal Government, and the public at large; and
- d. the extent to which the actions taken with respect to the incurrence of the cost are consistent with established institutional policies and practices applicable to the work of the institution generally, including sponsored agreements.

State Contracts Purchasing

There are numerous items used throughout the district that are available on Louisiana State contracts. The link to the State's contract website is http://doa.louisiana.gov/osp/lapac/eCat/dsp_eCatSearch.cfm. This link will take you to the list of contracts by T-number. To view the contract you are interested in you must first record the T-number located to the right of the contract name. You must then click on the contract and on the next screen select the T-number option and put the number in the search box. This will bring you to the contract's home page. You must then select the commodities option to view the items on the contract.

To request the items you desire you must include the contract number and the line item number (s) on the purchase requisition. The Purchasing Department is available to assist with the State Purchasing process, up to and including locating the requirement for which you are looking.

Emergency Procurement

An “emergency” means an unforeseen mischance bringing with it destruction, or injury of life, or property, or the imminent threat of such destruction or injury, or as the result of an order from any judicial body to take immediate action which requires construction or repairs.

In cases of emergency where such emergency has been certified by the Board, the goods, services or major repairs may be procured in an abbreviated timeline. The advertisement requirement of the Public Bid Law shall not apply.

- The Superintendent must provide a written recommendation describing the emergency situation to the School Board. If the School Board certifies the existence of such emergency, the provisions of the Louisiana Public Bid Law shall be followed.
- If an extreme emergency situation requires the purchase of goods or services or major repairs by Superintendent prior to declaration of same by the School Board, after obtaining prior approval by the President or Vice President said purchase shall be placed on the Agenda for ratification at either a regular or special meeting held no later than ten (10) days from the date of said emergency purchase.
- The procurement method selected must assure that the goods, services, or major repairs are purchased in time to meet the emergency
 - Competition as practicable should be obtained, i.e. telephone quotations, written quotations or sealed bids. Any offer accepted must be confirmed in writing.
 - A record of the emergency procurement shall be maintained that lists a description of the supplies, services, or major repairs procured under each contract; the name and address of each bidder quoting; the amount and type of each contract; and the identification number of each contract file.
 - If quotations are received that are lower than the accepted quotation, the reason(s) for their rejection shall be recorded and made a part of the contract file.
- Records shall be maintained for a minimum of six years following the purchase or completion of the repairs.

Contracts – Supplier Performance Review Evaluation

All OPSB contracts contain a standard clause that encompasses supplier evaluation and performance is required. This evaluation provides the opportunity to assure that the service currently being provided is meeting contract specifications. The supplier review will allow dialogue for continuous improvement from both parties.

The supplier evaluation and performance clause includes language to ensure that:

- The manager or the designee of the contract will be responsible for at least a quarterly review if not monthly review with the supplier.
- The review will be based on the contract deliverables and the timeline events that were scheduled to occur.
- On a quarterly basis, the Purchasing/Ancillary Services Director or designee will hold a review with the Contract Manager to review the supplier's performance. The purpose of the meeting will be to review supplier evaluations and together, with the supplier, develop opportunities for continuous improvement and resolution of problem issues.

The implementation of this supplier evaluation procedure will not only benefit the school district in the assurance of timely follow-up and action, but will also provide the District with a strong base of qualified suppliers.

The Purchasing Department is available to provide assistance to Contract Managers in structuring the monthly performance format. A sample evaluation form is attached to this document in the Appendix. The Department will also assist in conducting the initial reviews with suppliers.

This evaluation process is imperative because it eliminates problems that can occur, and it opens up dialogue for continuous improvement from both parties.

APPENDIX A

The PO Process Flow

Purchase Order Process Flow

1. After the Purchase Order (PO) is processed, Purchasing staff will send the original to the vendor to activate the order and two (2) copies of the PO to the requestor. One (1) copy of the P.O. will serve as the Receiving Report.
2. If the items are not received by the delivery date indicated on the PO, the requestor should contact the vendor. If the vendor cannot fill the order, or the requestor is dissatisfied with the vendor's response, the requestor should contact Purchasing.
3. Upon delivery, the supplies or equipment should be inspected and compared to the Receiving Report to insure that all items have been delivered and the items meet the specifications described on the PO.
4. If all items are correct, sign the Receiving Report and forward to Accounts Payable.
5. If the order is incorrect, the Requestor should contact the vendor or Purchasing.
6. If only part of the order has been received, make a copy of the Receiving Report and specify item(s) received. Sign and forward the copy to Accounts Payable.
7. When the total order has been received, indicate the items received, sign the Receiving Report and forward to Accounts Payable. Remember to make a copy of the receiving Report for your records.
8. All vendors should send invoices directly to Accounts Payable. If the vendor sends the invoice to the school/department and the merchandise has been received, sign the invoice and forward to Accounts Payable.
9. Accounts Payable is responsible for making payment once all supporting documents have been received.

Upon completion of services under a professional services agreement:

1. Obtain a signed invoice from the Consultant containing the specific amount to be paid.
2. Write the PO number on the invoice.
3. Sign the invoice for approval.
4. Send the PO and signed invoice to Accounts Payable for payment
5. Complete the Contractor Evaluation form and forward to Purchasing.

NOTE: In order for a bill to be paid, Accounts Payable needs both an invoice and the signed Receiving Report/PO.

APPENDIX B

<h1>ORLEANS PARISH SCHOOL BOARD CONTRACT</h1>

BE IT KNOWN, the Orleans Parish School Board (hereinafter sometimes referred to as *OPSB*) and _____ (hereinafter sometimes referred to as *Contractor*) do hereby enter into a contract with funds provided by the program entitled _____, under the following terms and conditions. If a federal program, provide Catalog of Federal Domestic Assistance (CFDA) Number _____.

1. Scope of Services

Contractor hereby agrees to furnish the following services: *(If the Scope of Services is lengthier than will fit here, it may be attached separately.)*

- *Specific goals and objectives:*

- *Deliverables:*

- *Performance Measures:*

- *Monitoring Plan:*

2. Payment Terms

In consideration of the services described above, OPSB hereby agrees to pay the Contractor a maximum fee of \$_____ (_____). Payment will be made only on approval of _____. The Contractor must use the standard OPSB billing form for invoicing purposes.

If progress or completion is obtained to the reasonable satisfaction of the OPSB, payments are scheduled as follows:

3. Taxes

Contractor hereby agrees that the responsibility for payment of taxes from the funds thus received under this Contract shall be Contractor's obligation and shall be identified under Federal Tax Identification Number _____.

4. Termination for Cause

The OPSB may terminate this Contract for cause based upon the failure of the Contractor to comply with the terms and/or conditions of the Contract; provided that the OPSB shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) days after receipt of such notice, the Contractor shall not have either corrected such failure or, in the case which cannot be corrected in thirty (30) days, begun in good faith to correct said failure and thereafter proceeded diligently to complete such correction, then the OPSB may, at its option, place the Contractor in default and the Contract shall terminate on the date specified in such notice. The Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of the OPSB to comply with the terms and conditions of this contract; provided that the Contractor shall give the OPSB written notice specifying the OPSB's failure and a reasonable opportunity for the OPSB to cure the defect.

5. Termination for Convenience

The OPSB may terminate the Contract at any time by giving thirty (30) days written notice to the Contractor. The Contractor shall be entitled to payment for deliverables in progress, to the extent work has been performed satisfactorily.

6. Ownership

Any records, reports, documents, materials, or products created or developed under this contract shall be the property of the OPSB. Any work undertaken by Contractor pursuant to this contract shall be work made for hire, and the contractor hereby transfers and assigns to the OPSB any intellectual property rights, including but not limited to the copyright of any records, reports, documents, materials or products created or developed by Contractor in connection with the performance of this contract. No records, reports, documents, materials or products created or developed under this contract can be distributed free or for profit without explicit written approval from the OPSB.

7. Assignment of Contract

Contractor shall not assign any interest in this contract by transfer, novation, or assignment, without prior written consent of the OPSB. This provision shall not be construed to prohibit Contractor from assigning his bank, trust company, or other financial institution any money due or to become due from approved contracts without such prior written consent. Notice of any such assignment or transfer shall be furnished promptly to the OPSB.

8. Right to Audit

It is hereby agreed that the OPSB and/or other auditors representing OPSB shall have the option of auditing all accounts or records of Contractor which relate to this Contract. Copies of audits may be forwarded by the OPSB to the funding source of this contract, including but not limited to the State or Federal government.

9. Term of Contract

This Contract shall begin on _____ and shall terminate on _____. The effective date of this Contract may be extended only if an amendment to that effect is duly executed by the contracting parties and approved by the necessary authorities prior to said termination date. If either party informs the other that an extension of this Contract is deemed necessary, an amendment may be prepared by OPSB and forwarded to the other party for appropriate action by the other party. Said amendment is to be returned to OPSB with appropriate information and signatures not less than fifteen (15) days prior to termination date. Upon receipt of the amendment, it will be forwarded to the necessary authorities for their approval.

Notwithstanding the foregoing, in no event shall the total term of this Contract, including extensions hereto, be for a period of more than three (3) years.

10. Fiscal Funding

The continuation of this Contract is contingent upon the appropriation of funds to fulfill the requirements of this Contract. If sufficient monies are not appropriated to provide for the continuation of the Contract, or if such appropriation is reduced to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the contract, the contract shall terminate on the date of the beginning of the first fiscal year for which funds are not appropriated.

11. Discrimination Clause

Contractor agrees to abide by the requirements of the following as applicable:

- Title VI and VII of the *Civil Rights Act of 1964*, as amended by the *Equal Opportunity Act of 1972*
- *Federal Executive Order 11246*
- *Federal Rehabilitation Act of 1973*, as amended
- *Vietnam Era Veteran's Readjustment Assistance Act of 1974*
- *Age Act of 1975*
- *Americans with Disabilities Act of 1990*

The Contractor agrees not to discriminate in its employment practices, and will render services under this Contract without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, political affiliation, or disabilities.

Any act of discrimination committed by the Contractor or failure to comply with these statutory obligations when applicable shall be grounds for termination of this Contract.

12. Compliance Statement

By executing this contract, Contractor certifies that Contractor has conducted, with due diligence, an examination of its business relationships and affairs and to the best of Contractors knowledge, information and belief, Contractor is not prohibited from entering into this contract by La. R.S. 42:1113. Contractor further acknowledges that a violation of La. R.S. 42:1113 shall be grounds for termination of this contract for convenience.

13. Debarment and Suspension Clause

Contractor receiving individual awards hereby certifies that the organization and its principals are not suspended or debarred from any Federal or State program.

14. Confidentiality

This contract is entered into by Contractor and the OPSB in accordance with the provisions of the Family Educational Rights and Privacy Act, 20 U.S.C. Section 1231(g), et seq., (FERPA) and the Individuals with Disabilities Education Act, 20 U.S.C. Section 1400, et seq., (IDEA). Contractor hereby acknowledges that all documents which include personally identifiable information contained in or derived from a student's education records are deemed confidential pursuant to FERPA and IDEA. Contractor agrees not to re-disclose any such personally identifiable information without the prior written consent of the student's parent or the student, in the case of students who have reached the age of majority, or unless re-disclosure is otherwise authorized by law. Contractor agrees to return all documents deemed confidential pursuant to FERPA and/or IDEA to the OPSB at the conclusion of this contract.

15. Collections Fees

If Contractor invoices the OPSB, and OPSB pays Contractor, for work not done or for work not done in accordance with this contract, or if the OPSB for any reason pays Contractor any amount not actually owed by OPSB to Contractor pursuant to this contract, or if Contractor owes money to the OPSB for any reason whatsoever as a result of this contract, the OPSB may refer this matter to an attorney for collection. If the OPSB does refer this matter to an attorney, Contractor agrees to pay, in addition to the debt owed to the OPSB, the OPSB's reasonable attorney's fees, up to a maximum fee of thirty-three and one-third percent (33 1/3%) of Contractor's debt.

16. Jurisdiction, Venue and Governing Law

Exclusive jurisdiction and venue for any and all suits between the OPSB and Contractor arising

out of, or related to, this contract shall be in the Civil District Court, Parish of Orleans, State of Louisiana. The laws of the State of Louisiana, without regard to Louisiana law on conflicts of law, shall govern this contract.

THUS DONE AND SIGNED at New Orleans, Louisiana, on the day, month and year first written below.

IN WITNESS WHEREOF, the parties have executed this Agreement as of this _____ day of _____.

Orleans Parish School Board

Darryl C. Kilbert, Superintendent

WITNESSES' SIGNATURES

CONTRACTOR'S SIGNATURE

By: _____

Telephone: (____)_____

APPENDIX C

ORLEANS PARISH SCHOOL BOARD
PROFESSIONAL SERVICES BILLING FORM

Approved Contract Total _____ Contract Dates _____

Services Performed (if additional space is needed, please use *OPSB Detailed Description of Services* form)

COST ITEMIZATION

Unique Invoice Number _____ Final Bill YES NO
(Please Circle.)

Dates of Services Billed _____

Amount Requested _____

*Travel Requested _____ *Attach the Travel Expense Account Form and Receipts.

Total Amount Requested _____

I, the Undersigned, hereby certify that the above services have been performed; that all documents have been prepared as specified; that this claim is a true and correct claim for necessary expenses incurred by me; and that no payment has been received by me for the billed period.

Contractor's Name (Typed or Printed) _____ Tax I.D. or Social Security Number _____

Signature _____ Date _____

Address _____ City _____ State _____ Zip Code _____

OPSB Use Only

I confirm that the above named consultant has satisfactorily fulfilled the approved contract service provisions.

APPROVED: _____ Date _____
Program Manager/Department Head

APPENDIX D

Tips for drafting bid specifications

Since the goal of purchasing agents is to obtain quality products and services at the best price and within the parameters of applicable laws, rules and regulations, adequate specifications are required. Adequate specifications streamline the procurement process, while poor specifications cause unnecessary delays and may result in an inappropriate purchase, protest or necessitate a rebid.

Tips for preparing specifications:

- If the school/department is developing specifications from a brochure, work with end user to select the most important features required for their needs. Leave out brochure language that cannot be objectively evaluated. Delete words like "patented", "unique" and trademark symbols.
- Specifications should contain enough detail for the bidders to understand agency requirements.
- Describe competitively bid items generically — example: "facial tissue" instead of "Kleenex"
- Technical equipment specifications should contain enough detail to differentiate the level of quality or performance required.
- If sizes are part of the specifications, determine if a range is acceptable (indicate minimums and maximums), or indicate approximates. If the item must fit into a given space, indicate the available space.
- If weight is an important factor, indicate the acceptable range or minimum or maximum acceptable weight.
- Delivery, warranty, or training requirements should be clearly defined.
- Identify any instructional materials or service manuals that the Contractor must furnish. Also, incorporate into the specifications the type of training they must provide to the end users.
- When compatibility with an existing piece of equipment is a factor, describe the equipment, connectors, interfaces, brand and model of the existing equipment.
- If the agency desires to purchase a model like one they already have, verify that the model and brand number is still available. Requesting models that have been discontinued often wastes valuable time.
- Specifications should clearly state packaging requirements, size, types of finish, color coordination, etc.

- If installation is required, provide details on what is expected of the contractor. If a site visit is required, indicate a contact name and telephone number.
- When bidding maintenance, define the extent of service, parts, labor, travel, service hours required, number of preventative maintenance inspections, and any other inclusions or exclusions. Specifications should avoid using restrictive language such as "vendor must be located within a 20 mile radius of Baton Rouge." Request a reasonable response time instead.
- It is important to understand and indicate options to be included in the vendor's bid price. When upgrade capabilities are requested, clearly state if it is desired at time of purchase or in the future.
- If specifications indicate the desired brand and number, invite competitive brands by indicating "or equal" unless proprietary procedures have been followed.
- If performance specifications are included, are performance indicators outlined? Eliminate mandatory requirements if not important to the function of the purchase.
- Understand the use of the following words:
 - "Shall" denotes the imperative
 - "May" denotes the permissive
 - "Should" denotes desirable
 - "And" means it must have both or multiples
 - "Or" means either is acceptable
- Submittal of literature, proof of training, insurance or other certificate requirements with bid should not be mandatory. Instead, allow successful bidder to submit these documents after the bids have opened, prior to award.
- On long technical specifications, you may want to include a yes/no column to invite vendors' compliance response to assist in the evaluation process.
- Remember — you cannot evaluate a bid on criteria that is not part of the solicitation. Just because a particular brand and number specified has an inherent feature, you cannot rule out other bidders if the feature was not described in the specification. However if the inherent feature is unique to the brand and no other brand can meet the needs of the agency, see sole source or proprietary section for compliance requirements.

APPENDIX E

Contractor Evaluation Form

ORLEANS PARISH SCHOOL BOARD Performance Evaluation Form				
NAME OF CONTRACTOR:				
Please rate the Contractor in the applicable areas according to the applicable performance criteria				
A rating of "5" is best unless otherwise indicated				
NO.	PERFORMANCE CRITERIA	RATING		UNIT
MANAGEMENT				
1	Contractor's management abilities			(1-5)
2	Professionalism of Contractor			(1-5)
3	Subcontract management			(1-5)
4	Contractor's flexibility in handling unforeseen events			(1-5)
5	Ability to communicate effectively			(1-5)
6	Ability to coordinate the efforts of subcontractors			(1-5)
7	Ability to adjust to schedule changes and outages			(1-5)
8	Ability to produce required documentation/permits/licenses			(1-5)
9	Response time to routine changes			(1-5)
10	Overall knowledge of subject matter			(1-5)
11	Overall performance of Contractor			(1-5)
12	Your overall customer satisfaction			(1-5)
13	Your comfort level in hiring the Contractor again based solely on performance			(1-5)
TECHNICAL				
14	Overall Contractor quality and workmanship			(1-5)
15	Quality of deliverables/services			(1-5)
16	Ability to seek Value-added activities			(1-5)
17	Ability to follow OPSB rules			(1-5)
18	Ability to minimize change orders/scope changes			(1-5)
19	Ability to minimize lost production time			(1-5)
20	Ability to minimize errors/defects			(1-5)
21	Ability to follow-up on open items			(1-5)
22	Contractor's housekeeping practices			(1-5)
23	Overall skill level of Contractor's workforce			(1-5)
SAFETY/QUALITY CONTROL				
24	Contractor's knowledge of rules and regulations			(1-5)
25	Compliance with Owner's safety programs			(1-5)
26	OSHA/EPA/DOL knowledge & compliance. Any known violations? Y/N			(1-5)
27	Completeness of Safety & Health and Quality Plans			(1-5)
OTHER				
28	Response time to emergencies and changes			(1-5)
29	Response time to warranty work requests			(1-5)
30	Services completed in a timely manner			(Y-N)
31	Services completed ahead of schedule			(Y-N)
32	Contractor invoices clear & consise, including proper documentation			(Y-N)

OVERALL RATING: [] Outstanding (5) [] Above Average (4) [] Satisfactory (3) [] Marginal (2) [] Unsatisfactory (1)

Space is provided on Page 2 for comments. Comments would be particularly appreciated concerning outstanding and less than satisfactory performance.

PURCHASE REQUISITION CHECKLIST
\$0 to \$9,999

No.	Description	
1	Approved requisition in MUNIS for all funds (general & special revenue)	
2	Detailed specifications for equipment & materials including brand name, model, manufacturer number, color, dimension and size	
3	Detailed delivery instructions including distribution list, name, address, room number and contact person receiving materials	
4	Price quote from the vendor and justification for procurement	
5	State contract purchases include contract number and line number	
6	Professional services include quote from the provider and justification for procurement	
7	Professional services contract includes detailed description of services to be provided and includes the cost, dates, and location of services	
8	All non-competitive procurements require a cost reasonableness statement	

NOTE: TO SET UP A NEW VENDOR PLEASE ACCESS THE VENDOR REGISTRATION FORM ON THE OPSB WEBSITE IN THE PURCHASING DEPARTMENT LINK, HAVE THE VENDOR COMPLETE THE FORM, AND SUBMIT IT TO THE PURCHASING DEPARTMENT

PURCHASE REQUISITION CHECKLIST
\$30,000 to \$99,999

No.	Description	
1	Approved requisition in MUNIS for all funds (general & special revenue)	
2	Approval of Special Revenue Director for special revenue expenditures (Purchase Requisition must be printed and signed by the Special Revenue Director or his designee)	
3	Detailed specifications for equipment & materials including brand name, model, manufacturer number, color, dimension and size	
4	Detailed delivery instructions including distribution list, name, address, room number and contact person receiving materials	
5	Purchases for goods and equipment require competitive pricing through the public bid process.	
6	State contract purchases include contract number and line number	
7	Consulting services and professional services includes quote from the provider and justification for procurement (Consulting services and professional services of \$50,000 or more are subject to competitive pricing via a Request for Proposal (RFP)*)	
8	Professional services contract includes detailed description of services to be provided and includes the cost, dates, and location of services	
9	All non-competitive procurements require a cost reasonableness statement	

*Exemptions: The following professional services are exempt from the requirement of competitive negotiation even if they exceed \$50,000: lawyers, doctors, architects, dentists, veterinarians, engineers, landscape architects and accountants.

NOTE: TO SET UP A NEW VENDOR PLEASE ACCESS THE VENDOR REGISTRATION FORM ON THE OPSB WEBSITE IN THE PURCHASING DEPARTMENT LINK, HAVE THE VENDOR COMPLETE THE FORM, AND SUBMIT IT TO THE PURCHASING DEPARTMENT

PURCHASE REQUISITION CHECKLIST
\$100,000 and above

No.	Description	
1	Approved requisition in MUNIS for all funds (general & special revenue)	
2	Approval of Special Revenue Director for special revenue expenditures (Purchase Requisition must be printed and signed by the Special Revenue Director or his designee)	
3	Detailed specifications for equipment & materials including brand name, model, manufacturer number, color, dimension and size	
4	Detailed delivery instructions including distribution list, name, address, room number and contact person receiving materials	
5	Purchases for goods, equipment, and services* require competitive pricing through the public bid process.	
6	State contract purchases include contract number and line number	
7	Professional services contract includes detailed description of services to be provided and includes the cost, dates, and location of services	
8	All non-competitive procurements require a cost reasonableness statement	

*Exemptions: The following professional services are exempt from the requirement of competitive negotiation even if they exceed \$50,000: lawyers, doctors, architects, dentists, veterinarians, engineers, landscape architects and accountants.

NOTE: TO SET UP A NEW VENDOR PLEASE ACCESS THE VENDOR REGISTRATION FORM ON THE OPSB WEBSITE IN THE PURCHASING DEPARTMENT LINK, HAVE THE VENDOR COMPLETE THE FORM, AND SUBMIT IT TO THE PURCHASING DEPARTMENT

Purchasing Schedule Based on Amount of Purchase

January 17, 2012

AMOUNT	REQUISITION APPROVAL ⁷	BID PROCESS ⁴	BOARD APPROVAL	CONTRACT PREP (Services Only)	PURCHASE ORDER
\$1-\$9,999 ⁵	1-3 DAYS	NOT REQUIRED	NOT REQUIRED	1-2 WEEKS ⁶	1-2 DAYS AFTER REQ APPROVAL
\$10,000-\$29,999 ⁵	1-3 DAYS	INFORMAL 2 WEEKS	NOT REQUIRED	1-2 WEEKS ⁶	1-3 DAYS AFTER RECEIPT OF BIDS
\$30,000-\$99,999 ^{4, 5}	1-3 DAYS	PUBLIC BID 30 DAYS	1-30 DAYS ¹	30 DAYS ⁶	1-3 DAYS AFTER EXECUTION OF CONTRACT OR SUPERINTENDENT'S APPROVAL
\$100,000 AND ABOVE ^{2, 5}	1-3 DAYS	PUBLIC BID 30 DAYS	15-30 DAYS ³	30 DAYS (MUST BE SIGNED BY THE BOARD PRESIDENT)	1-3 DAYS AFTER EXECUTION OF CONTRACT OR BOARD APPROVAL

- 1) SUPERINTENDENT AGENDA ITEM REQUIRED FOR GOODS AND MATERIALS
- 2) BOARD AGENDA ITEM REQUIRED FOR GOODS AND MATERIALS
- 3) DETERMINED BY WHEN THE NEXT BUDGET AND FINANCE COMMITTEE AND BOARD BUSINESS MEETINGS ARE HELD AFTER THE BID PROCESS
- 4) STATE CONTRACT PURCHASES DO NOT REQUIRE A BID PROCESS
- 5) ALL SPECIAL REVENUE PURCHASE REQUISITIONS MUST BE APPROVED BY THE SPECIAL REVENUE DIRECTOR PRIOR TO SUBMITTING TO PURCHASING
- 6) MUST BE SIGNED BY THE SUPERINTENDENT.
- 7) PLEASE SUBMIT ALL SUPPORTING DOCUMENTATION WITH YOUR REQUISITION, INCLUDING BUT NOT LIMITED TO; PRICE QUOTE(S), MANUFACTURER AND MODEL NUMBERS, DETAILED DESCRIPTION AND/OR SPECIFICATIONS, AND COLOR

NOTE: ALL ITEMS TO BE SUBMITTED TO THE BOARD MUST FIRST GO TO THE BUDGET AND FINANCE COMMITTEE FOR APPROVAL.