The Procurement Process

Procurement Services

July 20, 2017

Procurement Department's Role-What We Do

- Use best practices to source and procure materials, equipment and services in accordance with state and federal laws and regulations

- Manage bid and procurement activities for goods and services for all commodities

- Consult with departments on sourcing strategies, supplier outreach and procurement process

- Ensure procurement and bidding compliance

IMPORTANT POLICIES

POLICY 2006 Purchasing Authority

Applies to the bid and purchase of goods such as supplies, furniture, fixtures, equipment, and material of any kind (including such purchases made by schools using site-based funding)

IMPORTANT POLICIES

My boss told me to have a good day...

So I went home.

POLICY 4002 Staff Ethics

Each employee serves as a representative of the District and should strive to maintain standards of ethical behavior which will not detract from the educational process.

IMPORTANT POLICIES

POLICY 4003 Conflict of Interest

Employees of Shelby County Schools shall conduct their associations with organizations and individuals both inside and outside the school district in a manner demonstrating the highest degree of integrity.

STATUTORY BIDDING REQUIREMENTS

- All purchases over $500 must be made by a valid SCS purchase order.

- Purchases with total amounts ranging from $3,500-$9,999.99 may be made in the open market, but shall, whenever possible, be based upon at least three (3) competitive quotes.

- Purchases totaling $10,000 or more must be competitively bid.

- Bids or RFPs totaling $100,000 or more must be presented for the approval of the SCBE Board Members.

SOLICITATION PROCESSES

o **RFQ**- Request for Quotes ($3,500 - $9,999.99)
   Business awarded to the **lowest qualified bidder**.

o **ITB**- Invitation to Bid ($10,000 & above)
   Business awarded to **lowest qualified bidder**.

o **RFP**- Request for Proposal ($10,000 & above)
   Selection Committee appointed to review and select supplier
   to be awarded the business, based on pre-established criteria
   that may include price, quality, references, demonstrations and
   other factors.

o **RFI**- Request for Information
   Does not result in an award. Issued to create a fair public process when we
   need to gather information about a potential future purchase.

The Procurement Cycle
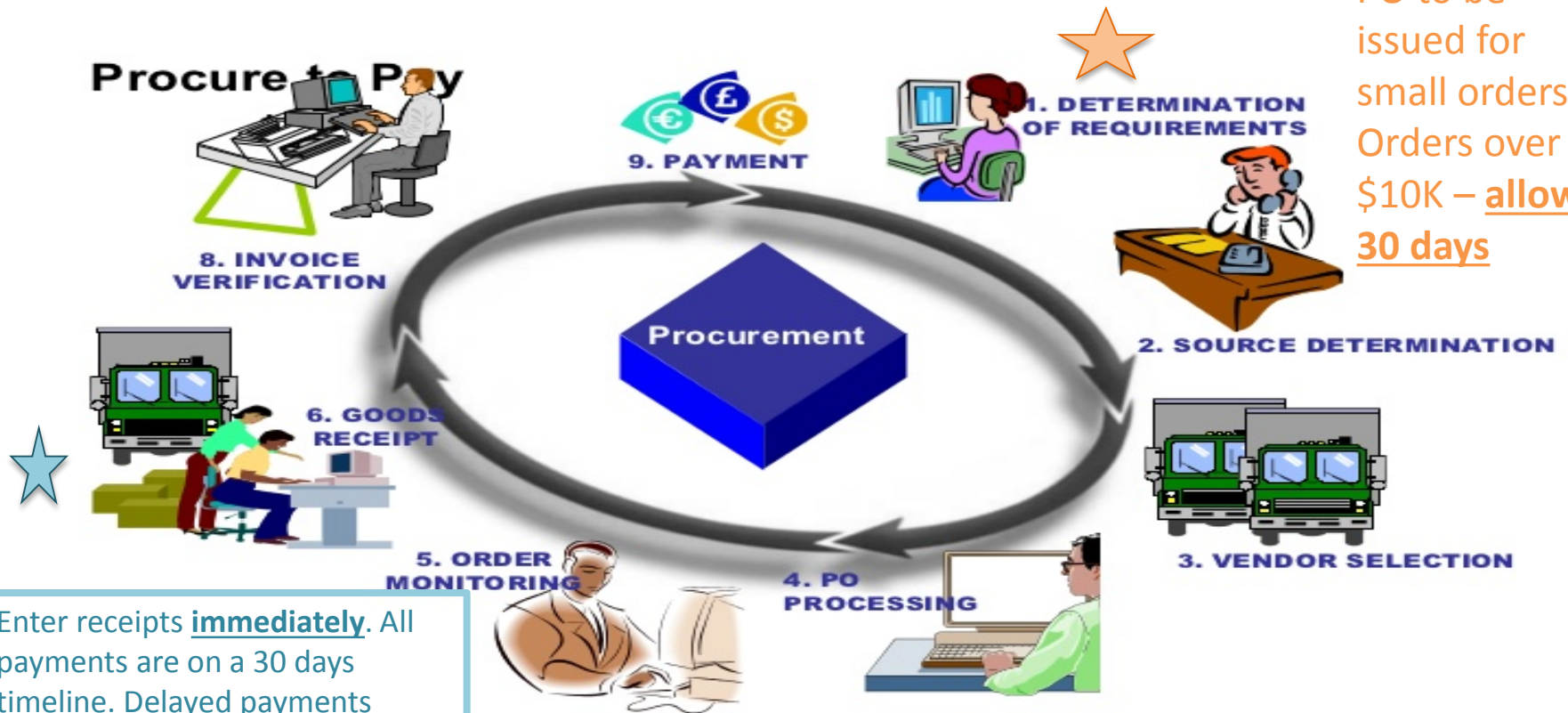
Please allow up to **2 weeks** for a PO to be issued for small orders. Orders over $10K – **allow 30 days**

Enter receipts **immediately**. All payments are on a 30 days timeline. Delayed payments could cause the vendor to freeze the district's purchasing account.

APECS Requisitions

Entering a Purchase Requisition is the first step.

o Enter requisition into APECS to initiate a purchase or bid process, or to request a contract (when applicable)

- Add internal comments & attachments to help reviewers and Buyer understand your request.

o If your supplier is not already listed in APECS, have supplier complete a Vendor Registration Form.

o Purchases of $10,000 or more must be bid out unless they qualify as a sole source or emergency purchase, or we can obtain the goods/services through an existing contract.

- Attach Sole Source Letter or Emergency Purchase justification information to your requisition.

o Track the approval status of your requisition to ensure that it gets turned into a Purchase Order.

HEADER'S TAB

R E Q U I R E M E N T

Do **NOT** leave this section blank. Please include justification for order.
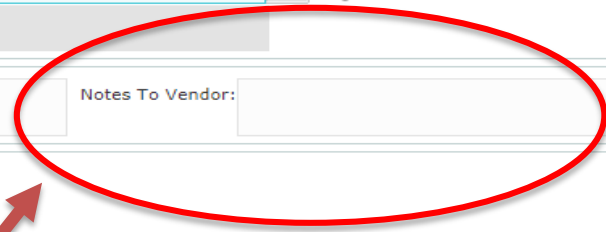
Place the requestor's contact info here!!

DETAILS TAB

Shelby County Schools

801364 | Felts, Paris - 07/19/2017 03:54 PM
PREMIER GROUP
This is a Test Request | 0.00 | Inactive

Requisition Search

Shelby County Schools
2018

e⁵d Business System
UNIFIED LIVE

Finance > Requisition > Details

Options | H

| Search | Header | **Details** | Travel Requisition | Approval Details |

Req. No.: 801364   Req. Date: 07/19/2017   PO No.:   PO Date: Ship To: _____
Grp. No.: 1 ▼ of 1   Distribution Type:

Account Info

✖	Account No		Percentage	Amount	Action 🖑	
☐		🔍			○	
☐		🔍			○	
☐		🔍			○	
☐		🔍			○	
☐		🔍			○	
		🔍			○	

Line Items Info

✖	Qty	UOM	CmdtyCd/Item/ISBN No	Description	Unit Cost	Ext Cost	Dis ☐
☐			⭐ 🔍	⭐			☐
☐			🔍				☐
☐							☐
☐							☐
☐							☐
☐							☐
☐							☐
☐							☐
☐							☐
							☐

Vendor Discount: ☐		S & H %	Amt	Net
Distribution Total:				0.00
Line Amount:			0.00	0.00
Tot. Req. Amount:			0.00	0.00

Session active for 00:54:50

| << Req | | Suspend | Cancel | Save & Continue | Save & Post | Clear | Clone | Add |

Leave "Ship To" blank on this page. The location was already entered on the "Header's Tab". Entering a location may cause the system to generate an incorrect address for shipment.

ALWAYS place the correct commodity code for each line item. This crucial code will route the order to the appropriate buyer. (you can find more codes by searching "*Texas Commodity Codes*" in your search engine.)
Note: Be sure to check if the code is in APECS. If not, use the code number closest to the code you received when searching for the item.

APPROVAL DETAILS TAB

Finance > Requisition > Approval Details   Options

| Search | Header | Details | Travel Requisition | **Approval Details** |

Zip: 84037

Bid/Term and Conditions

Bid/TC No	Description	Vendor Notes

Shipping Notes:

Group 1:   Ship To: Knight Road Elementary

Account No	Account Name	Short Name	Amount
01-71100-39900-215500-2385-0000	OTHER CONTRACTED SERVICES		3,091.16

Qty	UOM	PCode	Description	Unit Cost	Ext Cost
6.0000	each	785-32	ITEM NUMBER H480-500(annual fee)	100.0000	600.00
2.0000	each	785-32	ITEM NUMBER C500-00 (DICOVERY GRADES 1-3	649.0000	1,298.00
2.0000	each	785-32	ITEM NUMBER C610-000(STUDENTS AGES 10	499.0000	998.00
1.0000	each		shipping and handling	195.1600	195.16

Tax: 0.00   Discount: 0.00   Shipping: 0.00   Group Total: 3,091.16

| | Grand Total: | 3,091.16 |

Notes (Internal):   supplies will be used to help student comprehension. It will   Notes to Vendor: QUOTE # 38893
also be utilized for the professional development of
teachers while gaining student involvement.

Approval Details

Approver Action: None

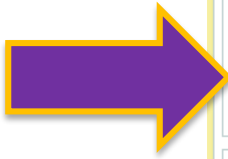Comments:

Approver	Action taken by	Date	Comments	Action
⊞ !Procurement Cost Center H...	Gray, Femetres	07/13/2017 12:03 PM		Approved
⊞ Buyer	Felts, Paris	07/14/2017 08:41 AM	please attach the quote	Returned
Johnson, Jannita		07/17/2017 12:21 PM		Approved
⊟ Buyer				
FELTSPD - Felts, Paris				

Session active for 00:54:47

Clear   Save

Check the status of your order using this page. The current approver is ALWAYS highlighted in yellow.

When receiving damaged items, please enter the receipts but make a note for Accounts Payable in the 2 (two) circled sections seen above.

APECS Statistics

➢ 9,500 Vendors in APECS

➢ Annual Spend approximately $242.5 million

➢ Process/approve 45,000 POs per year

➢ Seven (7) Buyers support entire District

ON-LINE RESOURCES

Go to the SCS Procurement Services website for:

- Vendor Registration Information

- Notice of Bids and RFPs

- Request for Proposal Instructions and Forms

- APECS Resources and Training Schedule

- Commodity Code Information

- Cell Phone Requisition Form

- Pricing Catalogs and more