



PROCUREMENT SERVICES – Frequently Asked Questions (FAQs)

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PROCUREMENT SERVICES – Frequently Asked Questions (FAQs)

1.Q - What is the action required for purchase dollar amounts?

- All purchases over \$500 must be made by a valid SCS purchase order.
- A minimum of three (3) competitive quotes in the open market is required for all purchases under \$10,000 (up to \$9,999), when possible.
- A purchase in excess of \$10,000 must be competitively bid.
- All purchases for goods and services with a cost of \$100,000 or more must be presented for Board approval. All contracts presented to the Board for approval **must** be presented 90 days before the projected effective date of the services.

2.Q - Is a requisition required for each dollar threshold listed?

Yes, a requisition **is required** for each purchase over \$500. If AP receives an invoice for a purchase over \$500 and the employee did not receive an approved purchase order, the employee will receive an Out-of-Compliance letter that will go into their HR file. After receipt of an Out-of-Compliance letter(s), the employee may be disciplined by HR.

For purchases over \$500, the District requires verification of the budget for the total amount of the goods and/or services. Procurement's receipt of the requisition with the purchase total is confirmation that the budget is verified and encumbered.

3.Q – What is a Procurement Advisory Form (PAF), and when do I need one?

The PAF is a Procurement form that is completed by Procurement staff, which indicates the action(s) required to process a requisition. After Procurement receives a requisition, it is analyzed as to the action(s) required for the purchase of goods and/or services. If applicable, Procurement will email the requestor the PAF to indicate the required action(s) to process the requisition.

If the requestor has to submit a contract request to General Counsel, the PAF must be attached to the contract request. The PAF is evidence to General Counsel that the requisition (budget) has been approved and the item in the contract request has been viewed/approved by Procurement. **The attachment(s) to the contract request should include the PAF and all supporting documentation required by General Counsel, or General Counsel will reject the contract request.** For questions regarding submitting a contract request, please contact General Counsel at 416-6370.

4.Q – How do I know what action is required for a new purchase, renewal of an agreement, etc.?

After receipt of a required requisition, the buyer will analyze the purchase for action(s) based on Board policies.

- a. **Renewal Agreement.** If the requisition is for renewal of an existing agreement, the buyer will verify the renewal terms. Upon analysis of a requisition for a renewal agreement, the buyer will complete the Procurement Advisory Form (PAF) and email it to the requestor for actions required. If Procurement approves proceeding with the renewal, General Counsel/Contracts will require the requestor to submit a contract request and attach the PAF from Procurement Services indicating approval to proceed with the renewal agreement. If the dollar amount of the services is \$100,000 or more, General Counsel/Contracts will submit the item to the Board for approval; therefore, please attach the required signed BAR, Board Briefing form, and second page of the Board Report form. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items.
- b. **Amend Existing Agreement.** To amend an existing agreement, submit the required contract request and attach the POCR and all supporting documents. For \$100,000 or more, the stakeholder must also attach the signed BAR, 2nd page of the board report and the Board Briefing Form to the contract request. Please email the POCR to Procurement to hold for amendment execution. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items. After the amendment is approved/executed, please email Procurement the

supporting executed documentation, and the buyer will process the POCR. Email address: procurementservices@scsk12.org.

- c. **New Purchase.** All requisitions for goods or services will be analyzed for action(s) based on Board policies. **Please see 5.Q and 6.Q for details regarding formal bids and Request for Proposals (RFP) or RFQ (Qualifications).**

- **Cooperative Agreement, Piggyback, Sole/Single Source, or Emergency Purchase or \$10,000 or more:** If Procurement has approved a cooperative agreement, piggyback, sole/single source, or emergency purchase, the purchase order for goods will be created and submitted to the vendor, if under \$100,000. If an agreement is required, Procurement will submit the contract request to General Counsel with the supporting documentation. Upon approval and execution of the agreement, the purchase order will be created and submitted to the vendor.

For Board approval of \$100,000 or more, Procurement will submit the contract request to General Counsel with the supporting documentation, and the stakeholder must submit Procurement the signed BAR, the Board Briefing Form, and the 2nd page of the board report for Procurement to add to the Board agenda. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items. Upon Board approval and execution of the agreement, the purchase order will be created and submitted to the vendor.

- **MWBE Participation:** For a formal bid or an RFP/RFQ (solicitation) that is estimated to be a cost of \$100,000 or more, SCS MWBE Office must access the project to set a goal for local Minority and Women-owned Business Enterprises (MWBE) participation (MWBE Policy #2010). When a requisition is received by Procurement that requires a formal solicitation with an estimated cost of \$100,000 or more, a notification of action (s) required will be sent to the requestor and the MWBE Office regarding the project/purchase. The stakeholder **must** contact the **MWBE Office at 416-4737** to complete the required forms and submit them to their office for project goal setting for the next upcoming weekly meeting. Meetings are held once a week or may be accommodated, if possible. Please call the MWBE Office for further detailed instructions and deadline information.

Note: WHEN THE FINAL AMOUNT IS DETERMINED FOR AN AGREEMENT, THE REQUISITION MUST INDICATE THE FIRST YEAR TOTAL AMOUNT OF THE AGREEMENT; OTHERWISE, GENERAL COUNSEL WILL NOT PROCESS THE AGREEMENT.

5.Q – How do I begin the formal bid process? (Required for Items with an Estimated Cost of \$10,000 or more)

- Stakeholder **must** submit a requisition with an estimated dollar amount for the purchase, which should include an attachment noting particular specifications.
- Upon receipt of the requisition, a notification of action(s), PAF, will be sent to the requestor regarding the project/purchase. For projects (purchases) with an estimated cost of \$100,000 or more, Procurement will notify the MWBE Office, but the stakeholder **must** contact the **MWBE Office at 416-4737** to complete the required forms and submit them to their office for project goal setting for the next upcoming weekly meeting. Meetings are held each Thursday or may be accommodated, if possible. Please call the MWBE Office for further detail instructions and deadline information.
- If applicable, after the MWBE Office has determined the MWBE goal for the project/purchase, Procurement will finalize the solicitation document. If a MWBE goal setting is not required for the solicitation (purchase/project under \$100,000), Procurement will finalize the solicitation document.
- Competitive sealed bids are typically advertised a minimum of ten (10) calendar days, but may be advertised up to two (2) weeks or more based on a scheduled pre-bid or other particulars of the bid.
- After receipt and analysis of the submitted bids, an Intent to Award notification is submitted to all bidders, and a contract request for a recommended awardee requiring a contract is submitted by the buyer to General Counsel, as well as placed on the Board Agenda for approval for a purchase/project of \$100,000 or more.

Note: If the purchase requires Board approval, the stakeholder must provide to the buyer the supporting justification for the recommended award(s) placed on the Board Agenda, as well as revise the requisition to indicate the determined amount of the award. A Board Agenda Request (BAR) form is required to be signed by the Chief of the stakeholder before an item can be placed on the Board agenda, as well as the stakeholder will submit to Procurement the Board Briefing Form and the 2nd page of the board report. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items.

- If a contract is required, the buyer will release the purchase order when the award recommendation is approved by the Board and the contract has been signed and fully executed.
- If a contract is not required, the buyer will process and release the purchase order, if under \$100,000. If \$100,000 or more, the buyer will submit the purchase to the Board for approval, and upon Board approval, the purchase order will be released to the vendor.

6.Q – How do I begin the Request for Proposals (RFP) Process or RFQ (Qualifications)? (Required for Services with an Estimated Cost of \$10,000 or more)

- Stakeholder **must** submit a requisition with an estimated dollar amount for the purchase.
- The stakeholder must complete the Scope of Services Form located on Procurement Services' website (click on 'Doing Business with SCS' and click on 'Manager and Employee Resources' to view and download form) and email it to: procurementservices@scsk12.org.
- After receipt of the requisition and receipt of the completed Scope of Services form, the assigned buyer will notify the stakeholder regarding the required action(s) and facilitation of the project by sending the PAF.
- For projects (purchases) with an estimated cost of \$100,000 or more, Procurement will notify the MWBE Office. But, the stakeholder **must** contact the **MWBE Office at 416-4737** to complete the required forms and submit them to their office for project goal setting for the next upcoming weekly meeting. Meetings are held once a week or may be accommodated, if possible. Please call the MWBE Office for further detail instructions and deadline information.
- If applicable, after the MWBE Office has determined the MWBE goal for the purchase/project, Procurement will finalize the solicitation document. If a MWBE goal setting is not required for the solicitation (purchase/project under \$100,000), Procurement will finalize the RFP solicitation document.
- Request for Proposals (RFP) and RFQs are typically advertised for three (3) weeks (15 business days). The buyer will work with the stakeholder and evaluation committee members in regards to the RFP/RFQ process for evaluation.
- After valid proposals/responses have been evaluated by the evaluation committee, an Intent to Award notification is submitted to all respondents and a contract request for the recommended awardee is submitted by the buyer to General Counsel, as well as placed on the Board Agenda for approval (if \$100,000 or more). **Note: If the purchase requires Board approval, the stakeholder must provide to the buyer the supporting justification for the recommended award(s) placed on the Board Agenda, as well as revise the requisition to indicate the correct total amount of the award. A Board Agenda Request (BAR) form is required to be signed by the Chief of the stakeholder before an item can be placed on the Board agenda, as well as the stakeholder will submit to Procurement the Board Briefing Form and the 2nd page of the board report. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items.**
- After the contract has been fully executed, the buyer will process and release the purchase order, if under \$100,000. If \$100,000 or more, the buyer will place the item on the Board Agenda for approval and release the purchase order after approval and receipt of the signed executed contract.

7.Q – Must professional services be competitively bid?

Professional services include, but are not limited to, insurance, auditing, accounting and financial services, professional development, business consulting services, educational consulting services, research services, seminar leader, surveys and studies, and consultants. Professional services shall not be based upon competitive bids, but shall be awarded on

the basis of recognized expertise, competence and integrity or other unique qualities. (Professional Services Contracts - Policy #2013). For questions regarding professional services, please contact Procurement Services at 416-5376.

After receipt of the requisition, the buyer will complete the Procurement Advisory Form (**PAF**) and email it to the requestor for actions required. General Counsel/Contracts will require the requestor to submit a contract request and attach the PAF from Procurement Services indicating approval to proceed. If the dollar amount of the services is \$100,000 or more, General Counsel/Contracts will submit the item to the Board for approval; therefore, please attach the required signed BAR, Board Briefing form, and second page of the Board Report form. The stakeholder must also submit a minimum one-page PowerPoint to the appropriate agenda coordinator of the Procurement or Academic Committee Meeting for Board items. After required approval(s) and receipt of the executed contract, Procurement will create the purchase order.

8.Q – What purchases require approval by the Board?

Board of Education approval is required for all service contracts equal to or exceeding \$100,000 and purchases of supplies, furniture, fixtures, equipment, and material of every kind that equal or exceed \$100,000. Board approval is required for any contract extending beyond one year (multi-year), regardless of the yearly dollar amount. Purchases shall not be split into individual components, nor shall service contracts, including Professional Service Contracts, be split for the purpose of falling outside these limits.

9.Q – What is the process to get a single source or sole source purchase approved?

Please go to SCS website and click on 'Doing Business with SCS'-----click on Manager and Employee Resources to access the Single/Sole Source form. Follow the instructions to email the completed form to Procurement Services to the email address indicated. Also, please remember to attach any supporting document when submitting the Single/Sole Source form. The Procurement Director will review all sole/single source purchase/services for approval and contact the requestor with the determination. Please see 4.Q.c for details regarding sole/single purchases and instructions for contracts, board approval, etc.

10.Q – How to request change to an existing purchase order?

Please go to SCS website and click on 'Doing Business with SCS'-----click on Manager and Employee Resources to access the Purchase Order Change Request (POCR) form. Follow the instructions to email the completed form to Procurement Services with supporting documentation. procurementservices@scsk12.org

If the POCR is for services and has a po total amount under 100,000, the stakeholder submits a contract request and attaches the POCR and other supporting documentation. If the new amount is an increase in total, General Counsel will need to amend the contract.

If the POCR is for goods and services with a total of \$100,000 or more, Board approval is required, if the total increased from previous amount. For goods only, please send the required Board documents to the buyer: Board Briefing Form, 2nd page of the board report, and signed BAR. For services, the stakeholder submits a contract request and attaches the POCR and other supporting documentation: Board Briefing Form, 2nd page of the board report, and signed BAR. For all Board approval items, a one-page PowerPoint for the Procurement or Academic Committee Meeting should be submitted to the appropriate agenda coordinator for the meeting.