



**OAKLAND UNIFIED
SCHOOL DISTRICT**

Community Schools, Thriving Students

Procurement Overview

**Presented to OUSD Board of Education - Audit Committee
April 4, 2016**



**Presented by Ruth Alahydoian – Chief Financial Officer
Michael L. Moore, Sr. – Operations Officer**



Agenda

Welcome

- Session Objective
- Procurement Staff
- Roles & Responsibilities
- If A Site Wants To Buy...
- Knowledge Center Dashboard – eMarketplace and IFAS Intranet Portal
- Core Functions
- Questions and Answers



Session Objective

To increase understanding of the roles and responsibilities in the Procurement Department



Procurement & Print Shop Staffing Information 2015-2016

Number Of Full Time Employees	7
Procurement Manager	Joel Ross
Purchasing Assistant	Glory Nkems
Contract Analyst	Brenda Lewis
Buyer	Marilyn Thomas
Lead Duplicating Equipment Operator	Lincoln J. Lee
Graphic Illustrator	Thomas Scott
Operations Officer	Michael L. Moore
DESCRIPTION: Administers the purchasing of materials, supplies, equipment, and services to assure that the district is provided with the highest quality goods and services in the most cost-effective way possible while achieving the appropriate balance between quality, total cost, and timeliness - <u>processing over \$242 million in purchase orders annually.</u>	



Roles & Responsibilities

Budget

- Ensures you have enough money to spend
- Ensures dollars are in the right places to spend
- Ensures you have not overspent your available dollars

Procurement & Distribution Services

- Maintains relationships with vendors
- Notifies vendors of requests for goods or services
- Assigns Purchase Order number for each request
- Receives and tags some goods, then delivers to site

Accounts Payable

- Receives notification that goods or services have been received at site
- Pays vendors based on invoices and purchase orders



If A Site Wants to Buy...

If A Site Wants To...	Use...	And Contact...
Buy Supplies	<ul style="list-style-type: none">• eMarketplace• IFAS Purchase Requisition Module	Procurement
Buy Equipment	<ul style="list-style-type: none">• eMarketplace• IFAS Purchase Requisition Module	Procurement
Buy Services	<ul style="list-style-type: none">• Contracted Services use the Contracts Online 2.0 System to generate a Professional Services Contract• Non-Contracted Services use the IFAS Purchase Requisition Module	Tech Services & Procurement



The Knowledge Center Dashboard

CENTRAL OFFICE STAFF HOME KNOWLEDGE CENTER FAQ

ABI	Academic Discussion	Board of Education	Budget Dev.Tool	Catering	Common Core, SBAC, Chromebooks	Contracts Online 2.0	CSSSP	Data Reports
Staff & Dept. Directory	EduSoft	E-Marketplace	Employee Dollar Stretcher	Employee Online	Employee Relations Center	Facilities Work Orders	Federal Time Accounting	IFAS - Dashboard
IFAS - Citrix	Instructional Minutes	IT Help Desk Ticketing System	Online IEP	On-track	OUSD Brand Tools	OUSD Libraries	Pay Resolution	School Messenger
Smartfind Substitute System	Staff Wellness	Summer Programs	Tech. & Computer Ordering System (TACOS)	Web 504				

Minimize



Purchasing Supplies, Equipment & Services

Procurement & Distribution Services Core Functions

- *Strategic Sourcing of goods and services to enhance Academic Achievement*
- *Maintains relationships with vendors*
- *Notifies vendors of requests for Supplies, Equipment & Services*
- *Assigns purchase order (PO's) numbers for each purchase requests (PR's)*
- *Receives and tags some goods, then delivers to site*
- *Use IFAS and eMarketplace to support procurement by:*
 - ✓ *Submitting requests to order goods and services*
 - ✓ *Checking the status of submitted requests*



RFI RFP RFQ or Bid?

The choice of which process to use: RFI RFP RFQ or Bid for which type of procurement depends on the desired outcome – is it information, a firm proposal or a detailed price bid that is required by Public Contract Code, OUSD Board of Education Regulation or preferred practice.



A Request for Information (RFI)

What Type?	Why Use It?	To Purchase What?
A Request for Information (RFI) is a method of receiving information from different vendors prior to formally purchasing	<ul style="list-style-type: none">• To compile detail about potential vendors and their capabilities• To advise potential vendors that you intend to source this product or service competitively• To show that you are acting fairly and including all participants• To gather information in a way that decides the next step	Products Or Services



A Request for Proposal (RFP)

What Type?	Why Use It?	To Purchase What?
A Request for Proposal (RFP) is a formal method of receiving <u>detailed and comparable</u> proposals from different vendors	<ul style="list-style-type: none">• You are notifying vendors of your intention to buy certain products or services.• You get a formal submission from the chosen vendors to enable comparison of the proposals• • You show that you have a formal and fair process without favoring a preferred supplier.	A Defined Product Or Service



A Request for Quotation (RFQ)

What Type?	Why Use It?	To Purchase What?
A Request for Quotation (RFQ) is a <u>competitive bid document used when inviting vendors and subcontractors</u>	<ul style="list-style-type: none">•An RFQ is suitable for purchasing products that are standardized or produced in repetitive quantities. A technical specification must be provided as well as commercial requirements.••Sometimes an RFQ can be preceded by an RFP where the shortlisted vendors are requested to provide a more detailed price quote.	<u>Submit A Bid On Projects Or Products.</u>



When to Get A Bid?

Procurement of **Materials, Supplies, Non-Capitalized Equipment, Equipment, Equipment Replacement and Services**, where aggregate amounts do not exceed the limits set by Public Contract Code sections 20111 through 20118, and 22002 shall require the number of written proposals as listed by the corresponding dollar amounts:



Bid Thresholds

PROCUREMENT THRESHOLD	PROCUREMENT PROCESS
1. \$0.01 to \$4,999.00	At least One (1) written proposal, but more is optimal to save on pricing.
2. \$5,000.00 to \$30,000.00	At least Two (2) written proposals must be obtained and submitted with the School District requisition for purchase of the item.
3. \$30,000.01 - \$87,800.00	At least three (3) written proposals must be obtained by the Purchasing Department. The Purchasing Department will award a Purchase Order to the vendor who has submitted pricing that is deemed lowest, reasonable and most responsive
5. \$87,800.00 and above	Formal bidding process by the Purchasing Department.



Questions and Answers

For More Information...

OUSD Website:

Financial Transparency Quick Link, or through *District Services* for Job Aides, forms, or instructions on everything you need.

Intranet:

In the Knowledge Center, search on “Purchasing Goods and Services”

Email:

michael.moore@ousd.org

EVERY STUDENT THRIVES!



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