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**

<table>
<thead>
<tr>
<th>Number Of Full Time Employees</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Manager</td>
<td>Joel Ross</td>
</tr>
<tr>
<td>Purchasing Assistant</td>
<td>Glory Nkems</td>
</tr>
<tr>
<td>Contract Analyst</td>
<td>Brenda Lewis</td>
</tr>
<tr>
<td>Buyer</td>
<td>Marilyn Thomas</td>
</tr>
<tr>
<td>Lead Duplicating Equipment Operator</td>
<td>Lincoln J. Lee</td>
</tr>
<tr>
<td>Graphic Illustrator</td>
<td>Thomas Scott</td>
</tr>
<tr>
<td>Operations Officer</td>
<td>Michael L. Moore</td>
</tr>
</tbody>
</table>

**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 - **processing over $242 million in purchase orders annually.**
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
<table>
<thead>
<tr>
<th>If A Site Wants To…</th>
<th>Use…</th>
<th>And Contact…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buy Supplies</td>
<td>• eMarketplace&lt;br&gt;• IFAS Purchase Requisition Module</td>
<td>Procurement</td>
</tr>
<tr>
<td>Buy Equipment</td>
<td>• eMarketplace&lt;br&gt;• IFAS Purchase Requisition Module</td>
<td>Procurement</td>
</tr>
<tr>
<td>Buy Services</td>
<td>• Contracted Services use the Contracts Online 2.0 System to generate a Professional Services Contract&lt;br&gt;• Non-Contracted Services use the IFAS Purchase Requisition Module</td>
<td>Tech Services &amp; Procurement</td>
</tr>
</tbody>
</table>
The Knowledge Center Dashboard

- ABI
- Academic Discussion
- Board of Education
- Budget Dev Tool
- Catering
- Common Core, SDAC, 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 EP
- On-track
- OUSD Brand Tools
- CUSD Libraries
- Pay Resolution
- School Messenger
- Smartfind Substitute System
- Staff Wellness
- Summer Programs
- Tech. & Computer Ordering System (TACOS)
- Web 504
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
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)

<table>
<thead>
<tr>
<th>What Type?</th>
<th>Why Use It?</th>
<th>To Purchase What?</th>
</tr>
</thead>
</table>
| A Request for Information (RFI) is a method of receiving information from different vendors prior to formally purchasing | • 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)

<table>
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<tr>
<th>What Type?</th>
<th>Why Use It?</th>
<th>To Purchase What?</th>
</tr>
</thead>
</table>
| **A Request for Proposal (RFP) is a formal method of receiving detailed and comparable proposals from different vendors** | • 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)

<table>
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<th>What Type?</th>
<th>Why Use It?</th>
<th>To Purchase What?</th>
</tr>
</thead>
</table>
| **A Request for Quotation (RFQ) is a competitive bid document used when inviting vendors and subcontractors** | • 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. | Submit A Bid On Projects Or Products. |
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

<table>
<thead>
<tr>
<th>PROCUREMENT THRESHOLD</th>
<th>PROCUREMENT PROCESS</th>
</tr>
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<tbody>
<tr>
<td>1. $0.01 to $4,999.00</td>
<td>At least One (1) written proposal, but more is optimal to save on pricing.</td>
</tr>
<tr>
<td>2. $5,000.00 to $30,000.00</td>
<td>At least Two (2) written proposals must be obtained and submitted with the School District requisition for purchase of the item.</td>
</tr>
<tr>
<td>3. $30,000.01 - $87,800.00</td>
<td>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</td>
</tr>
<tr>
<td>5. $87,800.00 and above</td>
<td>Formal bidding process by the Purchasing Department.</td>
</tr>
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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!