

School District of Palm Beach County

PURCHASING MANUAL



Purchasing Department

The School District of Palm Beach County

Monroe Benaim, M.D. – District 1

Chuck Shaw – District 2

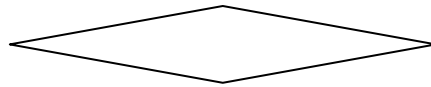
Karen M. Brill – District 3

Jennifer Prior Brown, Esq. – District 4

Mr. Frank Barbieri, Jr., Esq., Chairman – District 5

Marcia Andrews – District 6

Debra L. Robinson, M.D., Vice Chairman – District 7



William F. Malone
Superintendent



The School District of Palm Beach County is an
Equal Education Opportunity Provider and Employer.



Mission Statement

The School Board of Palm Beach County is committed to excellence in education and preparation of all our students with the knowledge, skills, and ethics required for responsible citizenship and productive employment.

Supported by:

FUNDAMENTAL BELIEFS

1. Educational Excellence
2. Equitable outcomes for all groups of students
3. Promotion of diversity as a social strength
4. Lifelong learning
5. Ethical foundations of behavior

SCHOOL DISTRICT OF PALM BEACH COUNTY

SCHOOL BOARD GOALS

1. **Increased Literacy** - Increase literacy in reading, writing, and mathematics, for all students, including students in Exceptional Student Education and English for Speakers of Other Languages, with an emphasis on grades K-3.
2. **Student Performance** - Improve achievement at critically low performing schools and among students in Quartile One district wide.
3. **School Safety and Environment** - Provide safe and nurturing school environments that are free of drugs, alcohol, firearms and harassment, and where standards of appropriate and ethical behavior are upheld.
4. **Challenging Curriculum** - Implement a challenging curriculum, including methods for individualized and group instruction, that supports the Board's mission and goals.
5. **Staff Development** - Provide continuous staff development that supports the Board's mission and goals.
6. **Financial Responsibility** - Institutionalize and correct, as needed, financial and management practices that are sound and accountable.
7. **Parental Involvement** - Increase involvement by parents, business and other community interests through partnerships designed to achieve both management and academic improvement and accountability.
8. **Productive Citizenship** - Provide experiences that prepare students for productive citizenship.

SCHOOL DISTRICT OF PALM BEACH COUNTY

KEY RESULTS

1. **K-12 Literacy** – All students of each racial / ethnic group will read independently on grade level by the end of second grade.
2. **Algebra 1** – All students of each racial / ethnic group will successfully complete Algebra 1 prior to tenth grade.
3. **Proficient in Reading, Writing and Mathematics** – All students of each racial / ethnic group will be proficient in mathematics, reading, and writing as measured by FCAT and FCAT Writes.
4. **School Grade Criteria** – All schools will meet or exceed a school grade of B as measured by the Florida accountability system.
5. **Upper Level Math and Science Courses** – All schools will increase enrollment and performance of each racial / ethnic group in upper level mathematics and science courses, with a particular emphasis on underrepresented populations.
6. **SAT** – All schools will increase participation and performance of students of each racial / ethnic group taking the SAT, with a particular emphasis on underrepresented populations.
7. **Advanced Programs** – All schools will increase enrollment and performance of each racial / ethnic group in gifted, honors, advanced placement, IB and other advanced programs with a particular emphasis on underrepresented populations.
8. **Dropout and Graduation Rates** – All schools will decrease dropout rates and increase graduation rates for students of each racial / ethnic group.
9. **Suspensions** – All schools will reduce suspensions and eliminate disproportionate suspension rates among student groups.
10. **Resources** – All district and system offices will align efforts and resources to accomplish Key Results.

*All students enrolled in Exceptional Student Education (ESE) programs are expected to make progress toward accomplishing the key results, as appropriate to their instructional program. Students with disabilities enrolled in ESE must be given access to the School District of Palm Beach County's general curriculum and appropriate assessments as prescribed by their Individual Education Plan (IEP).

THE SCHOOL DISTRICT OF PALM BEACH COUNTY PURCHASING DEPARTMENT

MISSION STATEMENT

The Purchasing Department is dedicated to providing professional and efficient procurement services and supports the activities of the School District, which includes: education, financial responsibility and community service, through contracting for all commodities and services; by maintaining procedures which foster fair and open competition, inspiring public confidence that all contracts are awarded equitably and economically; and by acquiring the greatest possible value and quality in the services and products purchased, with timely delivery.

GOALS

1. **PRICING**: To purchase at the best cost available and/or to obtain the best value in the marketplace.
2. **COMPLIANCE**: To assist the Administration of the School District by enforcing District Policy, the Florida Administrative Code, the State Board of Education Rule, and the School District's Rules, Policies and Procedures concerning purchases.
3. **PROCESSING and ASSISTANCE**: To receive, analyze, and process requisitions from schools and departments; prepare, open, and evaluate Invitations to Bid and Requests for Proposals; and issue Purchase Orders and Change Orders.

To provide and offer assistance to the schools, departments and administrators in writing specifications, obtaining required approvals, selecting vendors, researching needs, and resolving problems with orders.

4. **DEPARTMENT COMPLAINTS and VENDOR PROTESTS**: To act as a contact and intermediary between department personnel and vendors in a dispute. To investigate and resolve, at the informal level, all bid protests and other vendor complaints.
5. **INFORMATION and COMMUNICATION**: To keep a library of information on products, contracts, available vendors, laws, regulations, and other information necessary to fulfill all elements of our mission.

To publish memoranda and deliver to schools and departments the procurement tools, policies, procedures and standards needed to accomplish their missions.

6. **TRAINING**: To hold training sessions for personnel in the performance of their duties which relate to the purchase of goods and services for their locations.

FOREWORD

The Purchasing Department has prepared this Purchasing Manual for use by all employees of the School District of Palm Beach County, Florida. It is designed for employees involved in requesting, ordering, receiving and/or paying for and disposing of goods, services and construction needed by schools and departments. It is intended as a guide to point out the duties and responsibilities of all employees to help maintain the District's reputation for fairness and integrity.

To have a good purchasing program, all personnel involved must work as a team, and cooperation with one another is all-important. Those individuals whose duties require them to become a part of the purchasing cycle must be totally aware of the program and with the employees of the Purchasing Department who can help guide them through the purchasing process.

For efficient operation of the purchasing function, it is essential for all concerned to have a clear definition and understanding of its aims and purposes. The purpose of this manual is to point out District Policy and Procedure in respect to purchasing and to serve as a general framework within which consistent sound business decisions can be made. The policies and procedures outlined in this manual are all within the structure of Department of Education Rule, Florida Statute and School Board of Palm Beach County Policy.

The purchasing function involves the purchase of materials, supplies, equipment and services at the lowest possible cost consistent with the quality needed for the proper operation of our schools and departments. To achieve this objective, the purchasing function seeks to foster as much competition as possible. In doing so, it adopts the goal of fairness to ensure that the process is open to all who want to compete for our business.

Finally, the goal of integrity is woven throughout the purchasing cycle, in order to maintain the public's trust. This goal is achieved by complying with a code of ethics and all applicable legal requirements.

Sharon Swan, C.P.M.
Director of Purchasing

EXECUTIVE SUMMARY

Listed below is a summary of items that are reflected in the Purchasing Manual:

- The Purchasing Department is charged with purchasing for the District the best quality of supplies, equipment and services at the lowest cost. In order to maintain economies of scale, it is necessary for this Department to combine and bid like purchases. Therefore, it is required that all requisitions over \$1000 be sent to the Purchasing Department. The assigned Purchasing Agent will review and evaluate all requisitions over \$1000 and group all like items together. This process may require a formal written bid or RFP to be released by the Purchasing Department. The purchasing dollar thresholds are:
 - \$1000 is the minimum purchase order processed by Purchasing.
 - Over \$1000 but less than \$3,000 does not require a quote, but a requisition must be sent to Purchasing for review and evaluation.
 - Over \$3,000 but less than \$25,000 must have a minimum of three competitive quotes, preferably two of those from minority vendors.
 - Over \$25,000 requires a competitive sealed bid or RFP to be released by Purchasing.
- A blanket purchase order issued for over \$3,000 must be against a current contract.
- Visit our Website at <http://www.palmbeachschools.org/purchasing> .
- Bids and RFPs are available to view and print at no charge on www.demandstar.com
- The School District entered into an agreement with the Palm Beach County Health Care District to provide for school nurses and basic clinic supplies for our schools. Items not provided i.e., recovery couches, privacy screens, etc. should be purchased by the school through a PeopleSoft requisition.
- To help the Schools and Departments purchase supplies, equipment and services, the Purchasing Department will periodically release Purchasing Bulletins that contain important information. This information may include, but not be limited to, contract number, vendor name, vendor contact person, contract term, prices, etc. These bulletins are posted on the Outlook Public Folders Bulletin Board and the Purchasing Department web site, <http://www.palmbeachschools.org/purchasing>.
- Acquiring excess and obsolete equipment and furniture from Property Redistribution is now available by accessing the new e-surplus auction website at <http://www.publicsurplus.com/sms/palmbeach,fl/browse/home?tm=m>. Items are available for reuse within the District before being released for purchase by the public. Items requested for reuse within the District are acquired and delivered at no cost to the school/department.
- Over 500 forms are available on the Records Management Electronic Forms web page (<http://www.palmbeachschools.org/Forms/Index.asp>). Contact the Forms Analyst at 357-7528 or PX 4-7528, with any questions about this web page. The Print Shop offers “on demand” printing for many other forms. The District warehouse stocks forms, such as receipt books, pre-numbered continuous forms and forms printed in large volume for cost efficiency.

TABLE OF CONTENTS

<u>Chapter</u>		<u>Pages</u>
1	Purchasing Department Purchasing Staff	1-1
2	Duties and Responsibilities Purchasing Department Principals and Department Heads All District Personnel	2-1
3	Purchasing Requirements and Thresholds	3-1
4	Purchases Exempt from the Bid/RFP Process	4-1
5	Typical Purchases That Require Additional Information or Special Handling Before Processing Data Processing Equipment and Software Office Furniture Food Medical Supplies Facilities Personal Items	5-1
6	Requisitions Purpose Pre-Planning Requisition Do's and Don'ts Requisition Preparation PeopleSoft Requisition Procedures	6-1 6-6
7	Specifications Definition Authority for Specifications Types of Specification Specifications Do's and Don'ts Preparation and Review of Specifications	7-1
8	Sole Source and Emergency Purchasing Sole Source Procedures Emergency Purchase Procedures	8-1
9	PeopleSoft System Procedures Conditions Applicable to Requisition Approval Payment Processing of Blanket Purchase Orders Receipt of Goods Bid Tracking Payment Guidelines Overview Reminders Often Asked Questions	9-1

<u>Chapter</u>		<u>Pages</u>
10	Multimedia Services	10-1
11	Purchase Orders	11-1
12	Purchases from School's Internal Funds	12-1
13	Contracts for Consultants	
	Consultant Procedures	13-1
	Consultant Forms	13-6
14	Contracts	14-1
	General	
	Types of Contracts	
	Origin of Contracts	
	Use of District Contracts	
	Contracts / Agreements	
	Contracts for Professional and Technical Services	
15	Competitive Sealed Bids	15-1
	Purpose	
	Definition	
	Procedures	
	Processing Times	
	Determination of Non-Responsive	
	Determination of Non-Responsible	
	Confidentiality	
16	Request for Proposal (RFP)	16-1
	Purpose	
	Authority	
	Definitions	
	Procedures	
	Evaluation Committee Policies and Procedures	
17	Blanket Purchase Orders	17-1
	Definition	
	Types of Blanket Purchase Orders	
	Procedure	
	Ordering of Goods and Services	
	Approving Blanket Purchases Orders for Payment	
	Completing Closing Out	
18	Acceptance	18-1
19	Vendor Performance	19-1
	General	
	Noncompliance	
	Importance of Vendor Performance File	

<u>Chapter</u>		<u>Pages</u>
20	Cooperative Purchasing General Authority Types of Cooperative Purchasing Procedures	20-1
21	Disposition of Surplus General Methods of Disposal Allocation of Proceeds Sales to Employees Security of Property Documentation Disposal of Grant-Funded Equipment Excess, Obsolescence & Scrap Policy Property Redistribution Procedures Procedures for Use of E-Surplus Auction	21-1 21-4 21-6
22	Purchasing Forms General	22-1
23	Warehouse and Pony Warehouse Requisitions in PeopleSoft Special Requests for Mail Delivery Service Bulk Mail Procedures	23-1 23-2 23-11 23-13
24	Purchasing Card Procedures	24-1
Appendix		
	Commodities by Purchasing Agent	C-1
	Board Policies	BP-1
	6.14 - Purchasing Department Policy	BP1
	3.22 - Standards of Conduct for Former School Board Members and Employees	BP-10
	6.07 - Internal Accounts	BP-10
	6.142 - Diversity in Business Practices	BP-11
	6.17 - Purchasing for School Food Service	BP-12
	6.19 - School Purchases of Graduation Supplies & Yearbooks	BP-13
	Definitions	D 1-15