PROCUREMENT 101
PURPOSE

To provide vendors with a better understanding of the rules, regulations and procedures that govern the procurement process for the Caddo Parish School Board.
OBJECTIVE

Be able to find solicitations relevant to your business.

Be able to gain access to those solicitations from a variety of sources.

Identify and avoid any pitfalls associated with the solicitation process.

To be pro-active in trouble-shooting any issues that may arise in the solicitation process.

Completely & correctly complete any solicitation your business desires to compete in.
TOPICS

Walk-Through: 33%
Governance: 34%
Solicitations: 33%
Governance
GOVERNANCE SOURCES
Rules & Regulations
US Office of Management & Budget (OMB)

2 CFR 200.318

Uniform Administrative Requirements, Cost Principles & Audit Requirements for Federal Awards.
Louisiana Revised Statute 38: Lays out the procurement code for non-state agencies in the State of Louisiana.

Most recent Overview of Title 38

https://app.lla.state.la.us/llala.nsf/87BD5C74CB17E03686257AB8006F37DE/$FILE/Public%20Bid%20Law%20FAQ.pdf
OTHER STATE

RS 38:2211-2296  Public Contracts
RS 39:1481-1526  Professional Services
RS 39:1761       Lease/Purchase

Louisiana Administrative Code (LAC) 34, Part 1

Small Purchase Executive Order BJ2010-16
CPSB Policy
- Policy DFK  Sale of Surplus Equipment & Supplies
- Policy DFL  Sale of Buildings & Land
- Policy DJE  Definitions & Operations
- Policy DJEAA  Procurement Cards
- Policy DJED  Bids & Quotations
## CPSB PROCUREMENT METHODS

<table>
<thead>
<tr>
<th>Procurement Method</th>
<th>Federal Requirement</th>
<th>State Requirement Title 38</th>
<th>State Requirement Title 39</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro Purchases</td>
<td>&lt;$3500</td>
<td>&lt;$1000</td>
<td>&lt;$5,000</td>
<td>Follow most restrictive</td>
</tr>
<tr>
<td></td>
<td>No competitive process required</td>
<td>No competitive process required</td>
<td>No competitive process required</td>
<td></td>
</tr>
<tr>
<td>Small Purchases (informal)</td>
<td>$3,500 - $150,000</td>
<td>$1,000 - $10,000</td>
<td>&lt;$5,000</td>
<td>Follow most restrictive</td>
</tr>
<tr>
<td></td>
<td>Price or rate quotation from qualified sources</td>
<td>3 or more quotes suggested but not required</td>
<td>No competitive process required.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$10,000 - $30,000</td>
<td>$5,000 - $15,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 or more quotes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sealed Bids (formal Advertising)</td>
<td>&gt;$150,000</td>
<td>M &amp; S &gt; $30,000</td>
<td>&gt;$25,000</td>
<td>Follow most restrictive</td>
</tr>
<tr>
<td></td>
<td>Publicly bid and awarded to lowest responsible bidder</td>
<td>Public Works &gt; $152,400</td>
<td>See LPC (R.S. 39:1551-1736)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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</thead>
<tbody>
<tr>
<td>Competitive Proposals</td>
<td>$&gt;150,000</td>
<td>M &amp; S $&gt;30,000</td>
<td>$&gt;25,000</td>
<td>See LPC (R.S. 39:1551-1736)</td>
</tr>
<tr>
<td></td>
<td>Request for Proposal from adequate number of sources; must have written method for selecting recipients.</td>
<td>Public Works $&gt;152,400</td>
<td>Publically bid awarded to lowest responsible bidder.</td>
<td></td>
</tr>
</tbody>
</table>

### Noncompetitive Proposals – Sole Source Purchases

Sole source purchases are appropriate only under the circumstances listed below and must be documented.

1. The item procured is only available from a single source; or
2. The purchase is in response to a public emergency that will not permit delay resulting from competitive process; or
3. The purchase is expressly authorized by awarding or pass-through agency in response from the School Board; or
4. After soliciting a number of sources competition is deemed in
CPSB PROCEDURES — BOARD DATES & TIMES

Board Work Session — 1st Tuesday of the Month

Board Meeting— 3rd Tuesday of the Month

(exceptions are made to accommodate holidays, breaks and other scheduling concerns)

Board meetings begin at 4:30, unless otherwise notified.
Solicitation
# Types of Solicitations

<table>
<thead>
<tr>
<th>Type of Solicitation</th>
<th>Requirements</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Quote- phone, fax or email</td>
<td>No requirement. Usually 3 quotes. Immediate – short turn-around</td>
<td>Basic documentation on pricing. May be formal or informal; level of documentation based on complexity and/or dollar amount. Does not go before the Board for approval.</td>
</tr>
<tr>
<td>Request for Bid Formal</td>
<td>Advertised in official journal. Minimum of 15 days turn-around.</td>
<td>Public opening and reading with tab sheet. Typically a low bid award. Board approval necessary for official award.</td>
</tr>
</tbody>
</table>
SOLICITATION DATES & TIMES

FORMAL BIDS

- Bids are opened at 10:30 or sometime thereafter
- Bids are opened in the Purchasing Department, unless otherwise notified

Note: Any bids submitted after the 10:30 deadline will not be accepted. NO EXCEPTIONS!
# Submission Requirements

<table>
<thead>
<tr>
<th>Type of Solicitation</th>
<th>Phone</th>
<th>Fax</th>
<th>Email</th>
<th>Hand Delivery</th>
<th>Electronic (Bid Express)</th>
<th>Snail Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote - Informal</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quote – Formal</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RFB (IFB) – Single use</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>RFB (IFB) - Contract</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>RFP (Service or Solution)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Can view solicitations at no cost.

Will be notified of bids associated with your business-type.

Subject to same deadlines.
SOLICITATION
WALK-THROUGH
Walk-Through
Identify the need.

School

Principals

Supervisor

Directors

Administration

Procurement
STEP 2: Purchase Requisition

Requisition created to encumber funds for purchase
Approvals from budget fund administrators
STEP 3

Determine if solicitation is necessary or required

NO: Create purchase order

Yes: Which type of solicitation

Quote, formal or informal
Request for Bid (RFB)
Request for Proposal (RFP)
Considerations on type solicitation used:

- Dollar amount
- Complexity of item order
- Number of items being ordered
- M&S vs. Service
- Other . . .
STEP 4
Complete Solicitation Process

Quotes: 3-5 days immediate award max. $30K

RFB: 15-21 days, needs Board approval over $30K

RFP: 21-30 days needs Board approval varies (service may or may not go before the Board)
STEP 5

Issue Purchase Order
Award Notification
Negotiate & Sign Contract
TYPES OF AWARDS

Single-use
Catalog Contract (% off contract)
Term-Contract
EXCELLENCE IN EDUCATIONAL PROCUREMENT