

PROCUREMENT 101

Caddo Parish School Board
Purchasing Department
Lisa S. Lloyd, MSL, CPPB
Director



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.

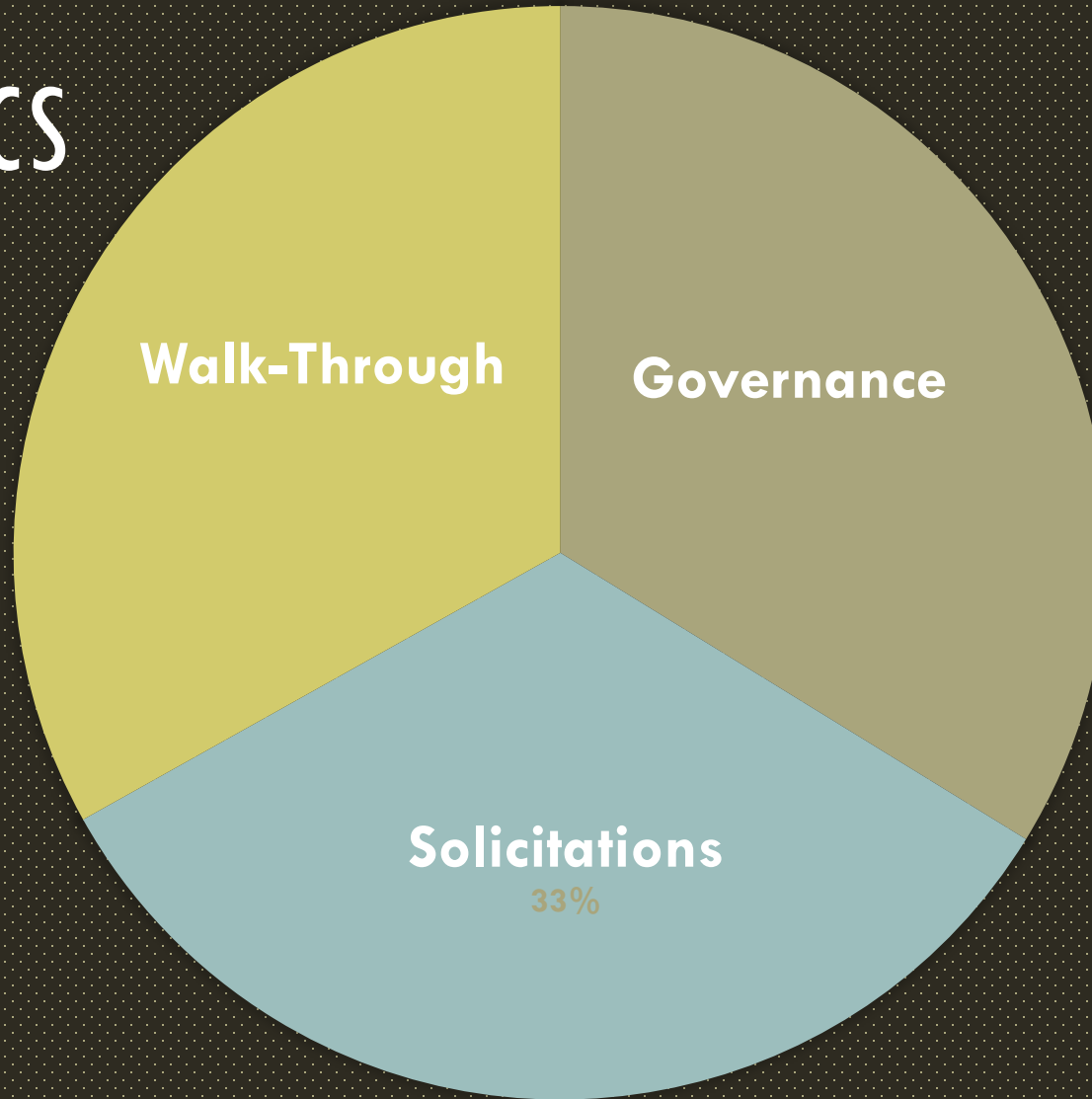
Identify and avoid any pitfalls associated with the solicitation process.

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

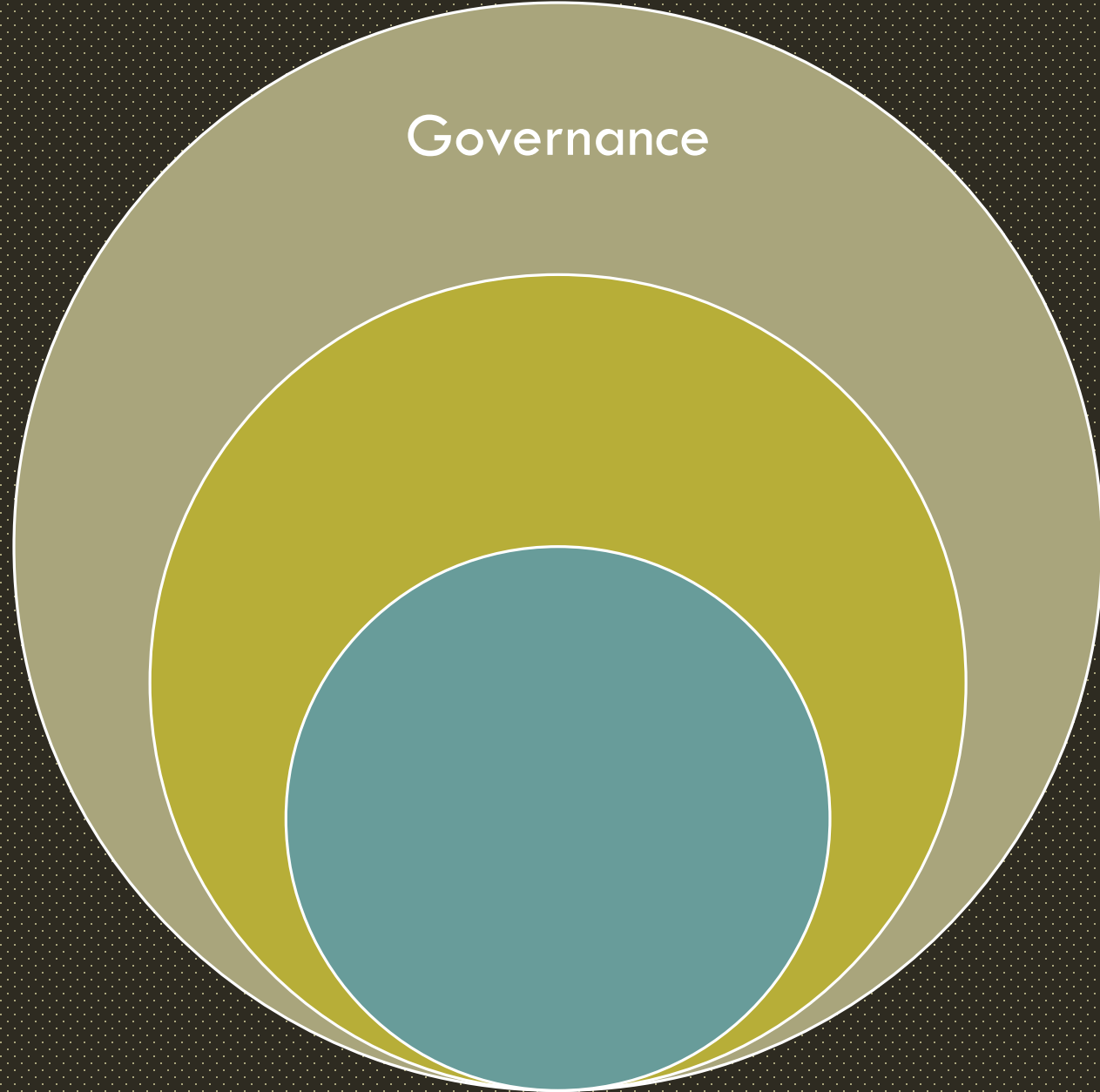
Completely & correctly complete any solicitation your business desires to compete in.



TOPICS



Governance



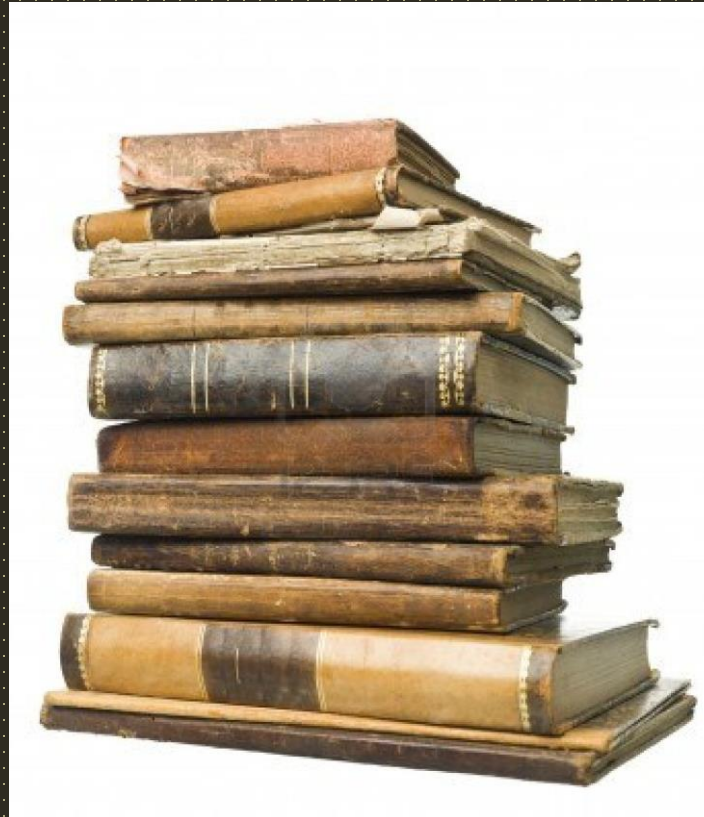
GOVNERANCE SOURCES



Rules & Regulations



CPSB POLICIES & PROCEDURES



FEDERAL

US Office of Management & Budget (OMB)

2 CFR 200.318

Uniform Administrative Requirements, Cost Principles & Audit Requirements for Federal Awards.

STATE

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.la.state.la.us/llala.nsf/87BD5C74CB17E03686257AB8006F37DE/\\$FILE/Public%20Bid%20Law%20FAQ.pdf](https://app.la.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

DISTRICT

CPSB Policy

- Policy DFK
- Policy DFL
- **Policy DJE**
- Policy DJEAA
- Policy DJED

Sale of Surplus Equipment & Supplies

Sale of Buildings & Land

Definitions & Operations

Procurement Cards

Bids & Quotations

CPSB PROCUREMENT METHODS

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Micro Purchases	<\$3500 No competitive process required	<\$1000 No competitive process required	<\$5,000 No competitive process required	Follow most restrictive
Small Purchases (informal)	\$3,500- \$150,000 Price or rate quotation from qualified sources	\$1,000- \$10,000 3 or more quotes suggested but not required	<\$5,000 No competitive process required.	Follow most restrictive
		\$10,000 - \$30,000 3 or more quotes	\$5,000- \$15,000 Solicit 3 or more quotes	
			\$15,000- \$25,000 Solicit 5 or more quotes	
Sealed Bids (formal Advertising)	>\$150,000 Publicly bid and awarded to lowest responsible bidder	M & S > \$30,000 Public Works > \$152,400 Publically bid and awarded to lowest responsible bidder	>\$25,000 See LPC (R.S. 39:1551-1736)	Follow most restrictive

CPSB PROCUREMENT METHODS

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Competitive Proposals	<p>>\$150,000</p> <p>Request for Proposal from adequate number of sources; must have written method for selecting recipients.</p>	<p>M & S > \$30,000</p> <p>Public Works > \$152,400</p> <p>Publically bid awarded to lowest responsible bidder.</p>	<p>>\$25,000</p> <p>See LPC (R.S. 39:1551-1736)</p>	

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

Type of Solicitation	Requirements	
Quote- phone, fax or email.	No requirement. Usually 3 quotes. Immediate – short turn-around	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.
Request for Bid Formal	Advertised in official journal. Minimum of 15 days turn-around.	Public opening and reading with tab sheet. Typically a low bid award. Board approval necessary for official award.
Request for Proposal	Advertised in official journal. Minimum 15 day turn-around. Normally 21 due to complexity.	Public opening. Typically graded on pre-determined rubric by committee. Board approval necessary for official award.

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

Type of Solicitation	Phone	Fax	Email	Hand Delivery	Electronic (Bid Express)	Snail Mail
Quote - Informal	✓	✓	✓	✓		
Quote – Formal	✓	✓	✓	✓		
RFB (IFB) – Single use				✓	✓	✓
RFB (IFB) - Contract				✓	✓	✓
RFP (Service or Solution)				✓	✓	✓

ELECTRONIC SUBMISSION

www.bidexpress.com

Can view solicitations at no cost.

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

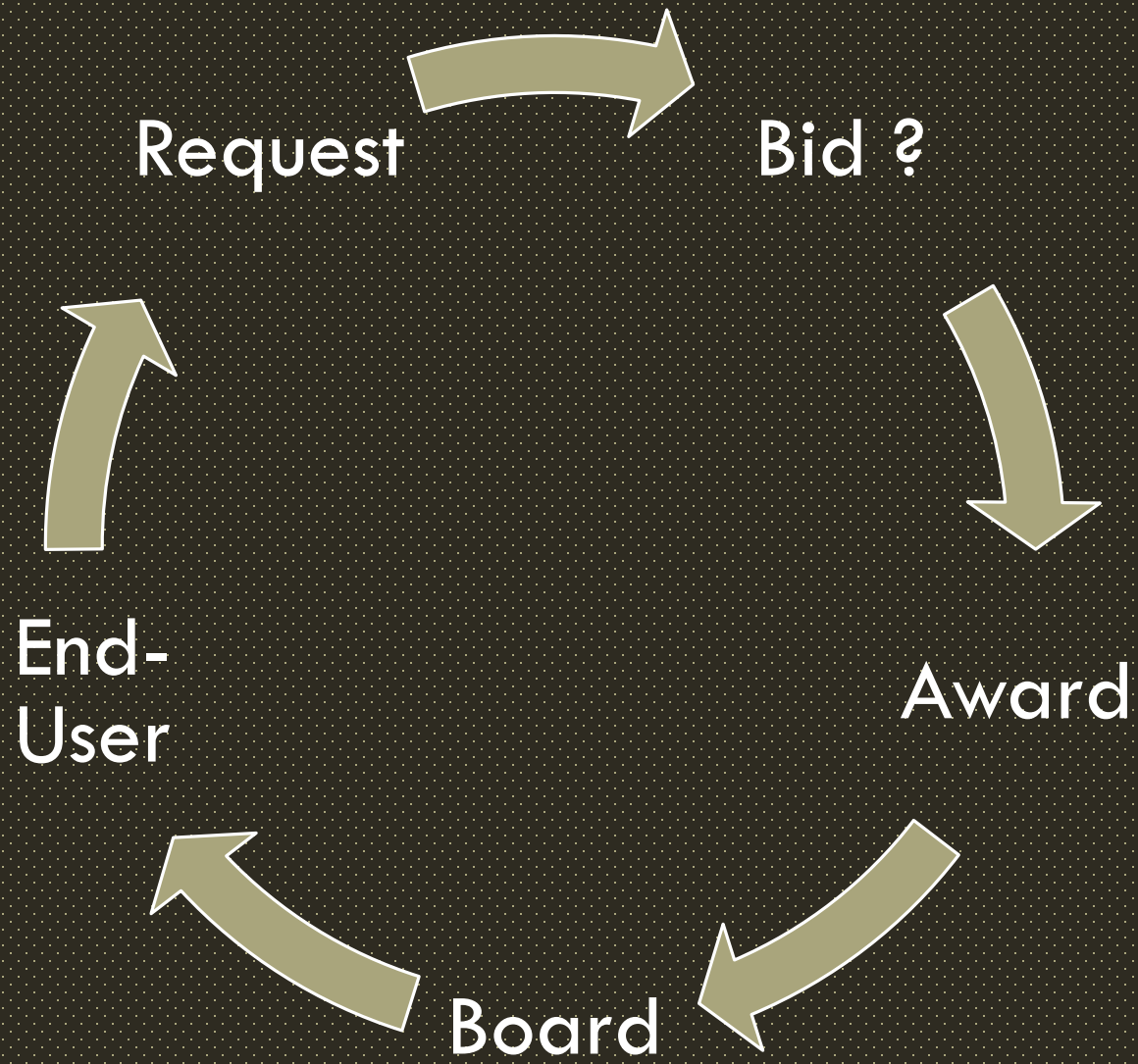
Subject to same deadlines.



SOLICITATION WALK-THROUGH



Walk-
Through



THE PROCESS . . .

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)



STEP 3(B)

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

CADDO PARISH SCHOOL BOARD

1961 Midway Street

P O Box 32000

Shreveport, LA 71133-3200

318.603.6481 (phone)

318.603.6474 (fax)

318.205.6687 (text only)

<http://www.caddoschools.org/caddo-schools-purchasing-department>



EXCELLENCE IN EDUCATIONAL PROCUREMENT