Purchasing Processes

Purchasing and Supply Services Department

August 21, 2019

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Purchasing & Supply Services

Department Responsibilities

Procurement and Contracting

- Responsible for soliciting, contracting, procuring materials, supplies, equipment, and services essential to the operation of the school system

Source and Scope Development

- Identify and develop sources, and assist account managers in developing specifications, soliciting bids, quotations and proposals, negotiating contracts and maintaining Oracle vendor files

Compliance

- Ensure that all procurement transactions are conducted in a legal, ethical, and professional manner

Vendor Services and Equity

- Offer all businesses an opportunity to compete for our business in a fair and open manner

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Procurement Methods: Formal Solicitations

Invitation for Bid (IFB)

- Sealed bid process for the procurement of goods or services that includes formal advertisement, specifications and conditions for the particular purchase, and a predetermined date and time for the bid opening

Request for Proposal (RFP)

- An instrument to solicit offers from Vendors for a specific requirement for goods or services

Request for Quotation (RFQ)

- The first step in selecting a professional service provider. The RFQ is used to solicit statements of qualifications to determine competence and ability without pricing information, and will evaluate and select the qualified candidates for the particular scope of services

Request for Information (RFI)

- A non-binding method whereby a jurisdiction publishes its need for input from interested parties for an upcoming solicitation.
- Used to obtain comments, feedback or reactions from potential suppliers prior to the issuing of a solicitation.

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Procurement Methods: Other Procurements

Minority Business Enterprise (MBE)

Increase minority, women and locally based business participation in the procurement process.

Cooperative Bids
- Multiple jurisdictions combine their requirements into one solicitation
- Potential for more favorable pricing
- Existing Cooperatives: State of Maryland, COG, US Communities and TCPN

Emergency Requests
- In cases where an emergency threatens personal safety, life, or property, limited authority exists to issue a non-competitive purchase order or contract
- However, such procurement shall be made with as much competition as is practicable under the circumstances

Professional Services
- There is a recognized need for the procurement of professional services when such services cannot be provided by PGCPS personnel (e.g., specialized services, guest lecturer, and seminar leader)
- Although not required by Maryland law, competitive procurement methods may be used if in the best interest of the District

Sole Source
- Goods and/or services are available from only one source
- Must be supported by a written justification letter
- Purchase should still be negotiated

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Suppliers

New Supplier Requests

- Supplier must register through iSupplier: www1.pgcps.org/isupplier/
- All Schools/Departments must submit a signed Letter of Justification to purchasing.clerk@pgcps.org
- On-line registration through iSupplier takes approximately 3-5 business days
- All documentation must be attached/received within five days
- If documents are not received within 3-5 day review period, registration will be rejected
- Upon approval, the supplier will be notified of their acceptance

Engaging Suppliers

- Prior to engaging a supplier, ensure that the vendor is already active in Oracle SSP
- Supplier must have an approved Purchase Order, prior to any products being delivered or any type of services being rendered
- Phone and/or email orders are strictly prohibited
- School/Department cannot authorize any product delivery or services without an approved PO from the Purchasing Office

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Requisitions and Purchase Orders

Requisitions

- To avoid processing delays, include detailed line item descriptions and attach all supporting documentation
  - Follow approval hierarchy for your area
  - If approval is over the Principal/Director's authority, manually insert next designated approver
  - Contact the Purchasing Oracle Integration Manager if additional assistance is required

Purchase Orders

- Ensures payment of goods/services
- Once items are received or services rendered, process receiving against PO in Oracle SSP
- Supplier will receive and electronic or mailed copy of PO. Please do not forward internal copy to the supplier. Contact Purchasing for assistance

- If you receive an Insufficient Funds warning at anytime throughout the approval process, contact your Budget representative.
- Invoices should be sent directly to Accounts Payable, with the PO number referenced for processing, Purchasing does not process invoices

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Oracle SSP Directions

From the Oracle SSP iProcurement Main Page:

1. Click on the supplier link
2. Select desired items and add to cart
3. When selection is complete, click on checkout
4. All items will be transferred to your Oracle Shopping Cart for requisition completion

Note: Change orders cannot not be processed against a punch-out order. Contact Purchasing for special orders.

Oracle SSP iProcurement Punch-Out

Direct Access to Suppliers:

1. Office Depot
2. PGCPS Print Shop
3. Really Good Stuff
4. School Health
5. School Specialty
6. Staples

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Justification Letters for Solicitations/ New Suppliers/ Contracts

Submit justification letter on School/Department letterhead signed by Principal/Director and include the following:

- Reason for requested supplier
- Anticipated spend amount
- Estimated period of services (solicitations/contracts)
- Contract copy, if applicable

Submit Justification to:

- purchasi@pgcps.org – For contract approval requests
- purchasing.clerk@pgcps.org – For vendor requests

Must be submitted and approved prior to any products being delivered or services rendered!

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Non-Bid Contracts

- Email to purchasi@pgcps.org 30-60 days in advance for review and approval

- Justification must be submitted with the contract

- Contracts with terms and conditions are subject to additional review by Legal Counsel

- A proposal is not a contract

- Fundraiser contracts – submit for record retention

- ✓ Enhanced Oracle iProcurement training
- ✓ Quarterly Outreach to Schools and Departments
- ✓ Sole Source Justification Form
- ✓ Updated Purchasing Manual

Contact Information

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Vendor Approval Request purchasing.clerk@pgcps.org – Contract Approval Request purchasi@pgcps.org

Questions and Answers

Thank you for your time and attention!

questions ?