Procurement 101 for Administrators

PRESENTED BY: THE DEPARTMENT OF PURCHASING

Objectives

Basic understanding of the bid laws that govern our procurementprocesses

Understanding CPSB Procurement policy

Rights & Responsibilities as a Fund administrator

Sungard/Business+

Practical application

Procurement

The process associated with obtaining materials, supplies, and services through a competitive methodology.

Purchasing

Making sure you get the right product, at the right time, and at the best price.

Making sure that the requisite laws are followed when making those purchases.

Promoting competition

LA RS 38:2212 Title 38

Governs quasi-state organization

Details the do's and don'ts

Details bid limits

Bid parameters

Bid Requirements

Bid limits

- Materials and Supplies-\$60,000
- Public Works-\$250,000

Time Requirements for Advertising

- Material and Supply bids (IFB)-15 days
- Request for Proposals (RFP)-30 days
- Public Works- Minimum 25 days

Procurement Methods:

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Micro Purchases	<\$10,000 No competitive process required	<\$10,000 No competitive process required	<\$10,000 No competitive process required	Follow most restrictive
Small Purchases (informal)	\$10,000- \$250,000 Price or rate quotation from qualified sources	\$10,000- \$30,000 3 or more quotes suggested but not required	<\$10,000 No competitive process required.	Follow most restrictive
		\$30,000 - \$60,000 3 or more quotes	\$10,000- \$20,000 Solicit 3 or more quotes	
			\$20,000- \$30,000 Solicit 5 or more quotes	
Sealed Bids (formal Advertising)	>\$250,000 Publicly bid and awarded to lowest responsible bidder	M & S > \$60,000 Public Works > \$250,000 Publicly bid and awarded to lowest responsible bidder	>\$30,000 See LPC (R.S. 39:1551-1736	Follow most restrictive

Procurement Methods:

Procurement Method	Federal Requirement	State Requirement Title 38	State Requirement Title 39	Action Required
Competitive Proposals	>\$250,000 Request for Proposal from adequate number of sources; must have written method for selecting recipients.	M & S > \$60,000 Public Works> \$250,000 Publically bid awarded to lowest responsible bidder.	>\$30,000 See LPC (R.S. 39:1551-1736	

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 to written request from the School Board; or
	4. After soliciting a number of sources competition is deemed inadequate. Process must be adequately documented

BusinessPlus & Approving Orders

Each log-in is specific to each user.

Things to check for when approving orders:

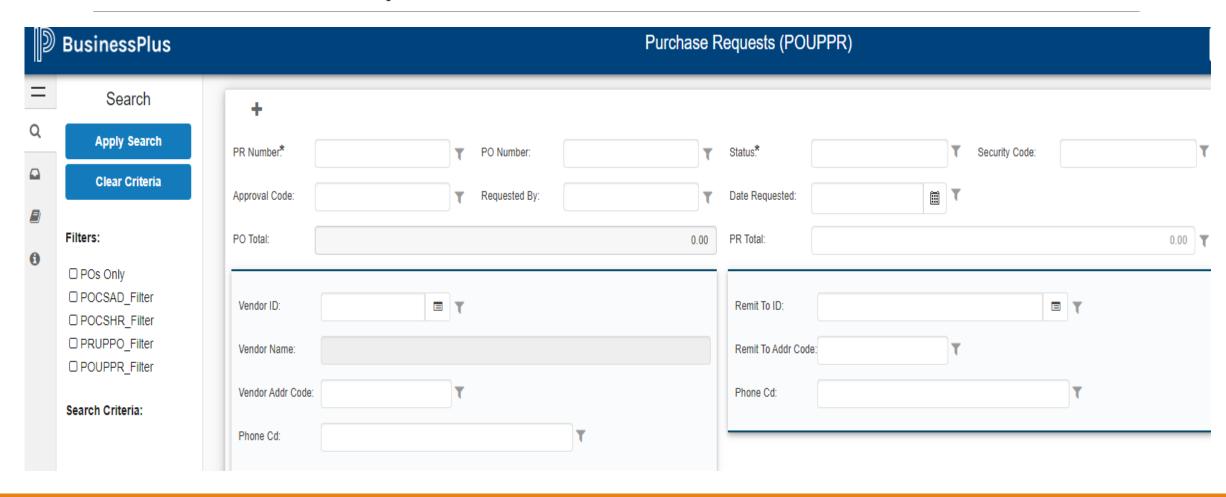
The right vendor

Shipping to the right location

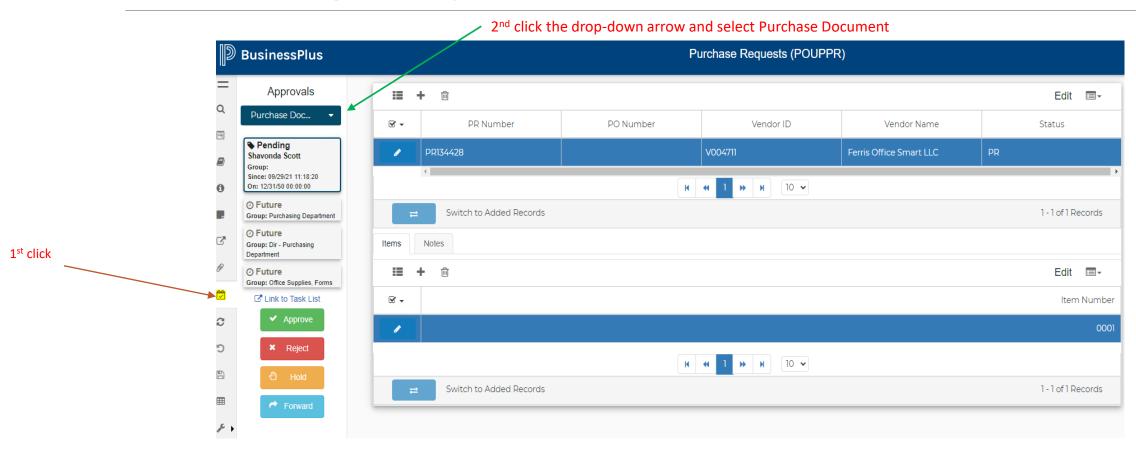
The right items, quantity and reasonable pricing

The right account number

Checking on your order – in Business +



Checking on your order – in Business +



Procurement Tools

CPSB Bid List

BusinessPlus Reports

Purchasing Staff

State of Louisiana eCat Database

A few other things . . .

<u>Security Code Access</u> – New and/or transferring employees must have security code access to use Business Plus.

<u>Training</u>-Supervisor's should email Purchasing staff to schedule BusinessPlus training for new employees or first-time users.

<u>Sharing Purchases</u>- Departmental and Finance approvals must be obtained prior to splitting a purchase across different departmental accounts.

We're here to help



Telephone: 318.603.6481

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