

Procurement 101 for Administrators

PRESENTED BY: THE DEPARTMENT OF PURCHASING

Objectives

Basic understanding of the bid laws that govern our procurement processes

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	<p>>\$250,000</p> <p>Request for Proposal from adequate number of sources; must have written method for selecting recipients.</p>	<p>M & S > \$60,000</p> <p>Public Works > \$250,000</p> <p>Publically bid awarded to lowest responsible bidder.</p>	<p>>\$30,000</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 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 +

BusinessPlus Purchase Requests (POUPPR)

Search

Filters:

- POs Only
- POCSAD_Filter
- POCSHR_Filter
- PRUPPO_Filter
- POUPPR_Filter

Search Criteria:

+

PR Number*: PO Number: Status*: Security Code:

Approval Code: Requested By: Date Requested:

PO Total: PR Total:

Vendor ID: Vendor Name:

Vendor Addr Code: Remit To ID:

Phone Cd: Remit To Addr Code:

Phone Cd:

Checking on your order – in Business +

2nd click the drop-down arrow and select Purchase Document

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). On the left, the 'Approvals' sidebar contains a 'Purchase Doc...' dropdown menu, a 'Pending' approval card for Shavonda Scott, and several 'Future' approval cards. Below these are buttons for 'Approve', 'Reject', 'Hold', and 'Forward'. A red arrow labeled '1st click' points to a yellow checkmark icon in the sidebar. The main area displays a table of purchase requests. A red arrow labeled '2nd click the drop-down arrow and select Purchase Document' points to the dropdown arrow in the 'Purchase Doc...' menu. The table has columns for PR Number, PO Number, Vendor ID, Vendor Name, and Status. The first row shows PR134428, PO number, V004711, Ferris Office Smart LLC, and status PR. Below the table are navigation controls and a 'Switch to Added Records' button. A second table below shows an 'Item Number' column with a value of 0001.

1st click

Procurement Tools

CPSB Bid List

BusinessPlus Reports

Purchasing Staff

State of Louisiana eCat Database

A few other things . . .

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

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

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

We're here to help



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