

The Mississippi Schools for the Deaf and the Blind

Procurement Operational Overview

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What is the role of the Procurement Department?



The procurement department's role includes every activity involved in obtaining the goods and services an entity needs to support its daily operations, including purchasing, negotiating, preparing contracts, issuing vendor purchase orders and ensuring all things related are and remain in compliance.



CONTRACTS



Professional Services

Independent Contractor Thresholds	Procurement Methods
Up to \$10,000	Two (2) Written Quotes No contract required/Purchase Order Required
\$10,000.01 - \$49,999.99	Three (3) Written Quotations Invitation for Bid Request for Proposal Request for Qualification Preapproved Vendor List No contract required/Purchase Order Required
\$50,000 - \$75,000	Invitation for Bid Request for Proposal Request for Qualification Preapproved Vendor List BOARD APPROVAL Contract/Purchase Order Required
Over \$75,000.01	Invitation for Bid Request for Proposal Request for Qualification Preapproved Vendor List BOARD APPROVAL Contract/Purchase Order Required

Professional Services (continued)

Contract Worker Thresholds	Procurement Methods
Up to \$75,000	Application processed through Human Resources (HR) Employment Agreement Required
Over \$75,000	Request for Application (RFA) Contract Required

School Districts are not required to contract individuals as contract workers.



Methods of Solicitation

Request for Quote

Invitation for Bid (IFB)

Request for Proposal (RFP)

Request for Qualification (RFQ)

Request for Application (RFA) – contract workers \$75k and over

Emergency (state guidelines approved by agency/district head)

Preapproved Vendor Lists (PVL) (dfa.ms.gov)



What is the difference between a Quote, IFB, RFP, RFQ, RFA?



Procurement Methods

Factors	Quotes (<\$50k)	Invitation for Bid (IFB) (>\$75k)	Request for Application (RFA) (>\$50k)	Request for Qualifications (RFQ) (>\$50k)	Request for Proposals (RFP) (>\$50k)
Determination	When simple specifications are required where price is the ONLY determining factor and there are several vendors that can perform the service. An award is made to the lowest and best bidder meeting the requested specifications and does not include discussions or negotiations.	District gives in-depth specifications. Bidder provides quality and timeliness of services with less emphasis on the bidder introducing their own ideas. An award is made to the lowest and best bidder meeting the specifications and does not include discussions or negotiations with bidders.	District gives in-depth specification for qualifications/requirements, sets the price for the services and controls the work to be performed. The contractor is a contract worker under the Internal Revenue Code. An award is made to the most qualified applicant(s) meeting	District gives in-depth specifications for qualifications, certifications and expertise and may set the price to guide the services. The vendor is an independent worker, and the agency has no control over the work. An award is made to the most qualified applicant(s) meeting the specifications and may be interviewed.	District gives in-depth specifications relative to requesting a plan to demonstrate a vendor's abilities to perform a degree of technical or professional experience or expertise. The cost proposal will most likely guide the funding of the project. An award is made to the offeror who receives the highest score based on weighted evaluation/review criteria outlined in the RFP and may include discussions and negotiations with offerors.
Bidder	Individuals/Companies	Companies	Individuals and District Entities	Individuals and Companies	Companies
Advertisement	No, as you can choose vendor to solicit based on the determination above.	Yes	Yes	Yes	Yes
Evaluation Review	No, lowest bidder	No, lowest bidder (price is a factor)	Yes (Districts utilize HR)	Yes	Yes
Competitive	Not if under \$5,000	Yes	Yes	Yes	Yes
Example(s)	Tutor/Painting Company	Charter Bus Services/Apple Branded Products	In the past an RFA was utilized for assistant teachers, bus drivers and custodians	Special Services, i.e., O&M, Speech Pathologists	Bilingual ASL-English Instructional and Instructional Support Services



When to use a Request for Quote?

- When cost/price alone is not a factor.
- When the specification/scope of work is well-defined (clear to both the seller and buyer).
- When the agency has the ability to adequately describe its needs.
- When the specification/scope of work are specific to the performance and design.
- Must solicit at least two (2) or three (3) vendor quotes, pending applicable threshold.



When to use an Invitation for Bid (IFB)?

- When cost/price alone is not a factor.
- When the specification/scope of work is well-defined (clear to both the seller and buyer).
- When the agency can adequately describe its needs.
- When the specification/scope of work are specific to the performance and design.
- Must be solicited publicly.

Example: Charter Bus companies as you know they can provide the scope of work, in multiple facets, and price is a huge deciding factor.



When to use a Request for Proposal (RFP)?

- When factors, other than price, are critical.
- When the requirements are highly technical.
- When the agency looks for each prospect to develop and provide ideas or solutions.
- When an agency has a complex need that is difficult to specify.
- If the agency needs flexibility in the award process to allow vendors an opportunity to revise their initial submission.

Example: When you're looking for a company or organization to provide a proposal detailing how they can provide the requested scope of services such as physical therapy, nursing, O&M and cafeteria.



When to use a Request for Qualification (RFQ)?

- When the most critical factor to the district is the vendor's qualification, skills or specialized experience.
- When no plan is given, only qualifications are needed.
- Serves more like a “pre-qualifying” process.

Example: When you're looking for specific qualifications in the area of tutoring, educational coaches in specific subjects, etc. and you want to narrow down the search for candidates before doing an actual RFP. When you directly know what you want an RFP is the best way to procure.



When to use a Request for Application (RFA)?

- District gives in depth specification for:
 - Qualifications/requirements;
 - Sets price for the services; and
 - Controls the work to be performed.
- Applicant is a contract worker under the IRS Code
- Award made to the most qualified applicant meeting the specifications and may be interviewed.

\$0 - \$75,000 (Human Resources)

\$75,000 and Over (Procurement Method)

School Districts don't normally contract individuals as contract workers.



Contract for Services Award

- After a Request For Quote is released, the lowest bidder receives the award.
- After an RFP, RFQ, RFA is released, the evaluation review is performed and awarding of the contract must take place for awards over \$50,000.
- The State Board of Education (SBE) approves **all** awards of \$50,000 and over.
- A Purchase Order (PO) shall be requested upon receipt of the signed contract \$50,000 and over



PURCHASING



Purchasing

Thresholds	Procurement Methods
Up to \$5,000	One (1) Written Quote
\$5,001 - \$50,000	Two (2) Written Quotes <i>Exception: Competitive State Contracts</i>
\$50,001 - \$75,000	Three (3) Written Quotes <i>Exception: Competitive State Contracts</i>
Over \$75,000	Invitation for Bid

Commodities, Furniture, Printing, Construction, Repair, Equipment and Property

Competitive State Contracts can be found at:

<https://www.dfa.ms.gov/dfa-offices/purchasing-travel-and-fleet-management/bureau-of-purchasing-and-contracting/contracts/>



Obtaining Quotes

- When obtaining quotes related to Educational Services, Trainings, i.e., O&M Services, ASL Services, Psychological Services, Tutoring Services, Professional Development Training, CPR Training, etc. please submit the Educational Services, Trainings Quote Form to the vendor/company for their completion, signature and submission along with their quote(s) on vendor/company letterhead. (Quote Form example on next slide).
- When obtaining quotes related to Operational Services, i.e., maintenance service, transportation services/repairs, grounds, custodial services, etc. please obtain quote(s) from vendors/company on their letterhead or email with a signature detailing services to be provided.
- If vendor/company is not registered to do business within the State of Mississippi we request that vendor/company is registered through DFA and has a Vendor Number or with the Mississippi Secretary's of State Office and has a Business ID Number.
- If this is the first time MSDB is doing business with the awarding vendor/company, please obtain a W9.



MSDB Quote
for Education Serv





QUOTE FOR ALL EDUCATIONAL SERVICES, TRAINING, CONSULTATIONS, ETC.

Date Quote Submitted: _____
MSDB Department: _____
MSDB Department Contact: _____
Questions concerning the quote should be emailed to: _____
Quote Deadline: _____

Please submit Quote on Company Letterhead

Vendor/Company Name: _____ Date: _____
Vendor/Company Contact Name: _____
Vendor Supplier # and/or Mississippi Secretary of State's Business ID: _____
Address: _____ City: _____ State: _____
Telephone Number: _____
Vendor/Company Representative Signature: _____

<u>SERVICES NEEDED & TIME FRAME</u>	<u>SPECIFICATIONS/DESCRIPTION OF SERVICE(S)</u>	<u>PRICE</u>
TOTAL COST		\$

VENDOR/COMPANY: If there is a Quote Expiration Date please indicate on the Quote.



Purchase Requisition

- Prepare Purchase Requisition by inputting the **School** - MSD, MSB, Business Office, Combined Services (MSDB), **Department** - SPED, MSB, MSD, MSD Library, MSD Athletics, MSB Athletics, Grounds, Maintenance, Transportation, Custodian, etc.
- Leave **PO No.** blank.
- **Quantity, Complete Description of Goods or Services To Be Rendered** (List under this column items being ordered. If quote contains up to about ten (10) items list each of them on separate lines or if quote contains more than ten (10) items you can type “**See Attached Quote**” on one line, input **Unit Price** and once you hit enter it should **Total** for you in the Total column.
- **Vendor Name, Vendor Address, Requested By** (you the Preparer), **Phone, Date Requested, Budget Year** FY24 or 2023-a1 (July 1, 2023– December 31, 2023) or 2023-a2 (January 1, 2024 – June 30, 2024).
- **Approved By** and **Date Approved** (Signed and Completed by Superintendent, Principal or Director who is signing off on use of Funds).





Barefield
se Order Request (

Book Systems PO
Request (\$429.85)

BSN Sports PO
Request (\$2,843.40)

MIB PO Request
(\$1,117.54)

Office Depot PO
Request (\$427.20)

School Specialty
Request (\$3,884.46)

Specialty
Request (\$

Lakeshore - <https://eproservices.lakeshorelearning.com>

Username: msdb_staff

Password: lakeshore123

(Instructions on next slide)

School Specialty - <https://select.schoolspecialty.com>

Username: pricingdb

Password: pricing123

(Instructions on next slide)

Barefield - <https://shop.barefield-local.com/>

Username: MSDB

Password: Supplies

Ginger - gford@wpsi.design

Maria - mtaylor@wpsi.design

Phone: (601) 354-4960

MIB - <https://www.msblind.org/>

Latoya - lfields@msblind.org

Phone: (601) 984-3289

ODP Business Solutions formerly Office Depot

<https://www.odpbusiness.com/>

Log-in: MSDBK12

Password: Welcome1

Being that we are offered state pricing, you can search the Mississippi Industries for the Blind (MIB) and Barefield websites for items you would like to order and obtain a quote by emailing or calling the contacts listed above. After obtaining the quote, prepare the Purchase Requisition (PR), obtain signature and email all items to procurement@msdbk12.org for a Purchase Order (PO) request. After a PO is generated, it will be emailed back to the Requester for submission to the vendor/company for order processing.

With regards to Office Depot and Staples you can utilize their shopping carts as quotes by placing items in their shopping cart, printing the shopping cart and emailing the shopping cart with the PR to procurement@msdbk12.org. Procurement will place the order from Office Depot and Staples for you and send you a copy of the PO for your records only.

EEF Cardholders that would like to order from Amazon can notify me and I will add them to our MSDB Business Account and after the cardholder has been added Amazon will email the EEF Cardholder to complete registration setup which requires entering in their card information, etc. Amazon only takes credit card for purchases and is unable to provide PO purchases at this time.

Lakeshore Learning

URL: <https://eproservices.lakeshorelearning.com/login>

Username: msdb_staff

Password: lakeshore123

- Click on the link above and sign in with your new username and password.
- Be sure to save the URL link to your browser favorites so you can return to the website easily in the future!*
- You can browse through our items by category, age range, or by entering keywords in the *Search* box. If you already know the items you would like to order, use the *Quick Order* link at the top of the homepage for a fast shortcut.
- Place your desired items in the shopping cart.
- When all your items are in the cart, simply click the *Checkout* button.
- If you are not ready to place your order, click *Save Cart to Shopping List*. Once you name your cart, it will be saved until you delete it.
- After you click *Checkout*, you will be prompted to enter your *Shipping* information. If it is already there, be sure to review it and make any Changes if needed. *Continue* when ready.
- Review Your Order. If no changes need to be made, select *Submit For Approval*.
- You will receive an order number and your order will be routed to your assigned Approver. Once your order is approved, you will receive a detailed order confirmation via email for your records.



School Specialty

URL: <https://select.schoolspecialty.com>

Username: pricingdb

Password: pricing123

School Specialty has created an account for MSDB and once you login to School Specialty's website, listed above, with the username and password provided, you will then create your own login with your email address. Afterwards you can place items you would like to order in the shopping cart, select pay by invoice, next select submit for approval, download the cart which will serve as a quote, print the quote and email the quote along with a signed and dated Purchase Requisition (PR) to procurement@msdbk12.org for Purchase Order (PO) approval. When you select pay by invoice, procurement will receive an email stating there is a cart awaiting approval and once reviewed, and if approved, procurement will generate a PO and submit the PO # to School Specialty for order processing. The Requester will receive an email indicating that your order has been approved and placed. **Remember when completing your login information in the Attention line please input your name so our Warehouse will know who the items belong to once received.** If for any reason the PO request is not approved, as always, I will contact you directly.



Mississippi Schools for the Deaf and the Blind
 1403 Eastover Drive Jackson MS 39211 P.O. 230042
 Phone: 601-984-8000 Fax: - REQ 00230042 REQ Created By DATE 7/26/2022 PAGE 1

BILL TO	Mississippi Schools for the Deaf and the Blind 1403 Eastover Drive Jackson, MS 39211	Fund-Glc-Func-Pgm-Obj-Ut	Amount
		1120-900-2410-000-610-03	\$429.85
		TOTAL AMOUNT	\$429.85

SHIP TO Tonya Dean
MS School of Blind Ph: 769-610-3409
 Warehouse/Receiving
 1253 Eastover Drive
 Jackson, MS 39211

VENDOR 6323
BOOK SYSTEMS, INC.
 4901 University Square, Ste 3
 Huntsville, AL 35816

NO BACKORDERS

QTY	UNIT	DESCRIPTION	CATALOG NUMBER	UNIT PRICE	TOTAL
3	EA	Dumb Polyester Digitally-Composed Barcodes (Singles): Includes Organization Name and Barcode Number		\$70.00	\$210.00
1	SH	Shipping and Handling		\$20.00	\$20.00
3	EA	Matte Vinyl Barcode Label Protectors: 5-mil Thick; Size: 1-1/4"H x 2-3/4"W; 1,000/Roll		\$59.95	\$179.85
1	SH	Shipping and Handling		\$20.00	\$20.00
				Page Total:	\$429.85
				Total Order:	\$429.85

NOTE: 1.Mississippi School for the Deaf and the Blind is a tax exempt agency.
 2.Cancel order on any items not in stock.
 3.Purchase Order Number must appear on all correspondence.
 4.EMAIL INVOICE to: accountspayable@msdbk12.org

APPROVED BY:

KM Sanders - Superintendent's Designee 7/26/2022
 SUPERINTENDENT OF EDUCATION Date



Purchase Order (PO) Request Procedures

- Obtain Quote(s).
- Prepare Purchase Requisition (PR), get signed and dated by Superintendent, Principal or Director.
- Email PR along with one (1) quote if under \$5,000, or competitive two (2) quotes \$5,001 up to \$50,000 or competitive three (3) quotes over \$50,001 to \$75,000 and W9 to procurement@msdbk12.org
- Over \$75,000 must do an Invitation for Bid.
- After the Purchase Order (PO) is generated, it will be emailed back to the Requester, and it is the Requester's responsibility to email the PO to the vendor/company for purchase processing.
- If there are any questions and/or concerns with regards to the PO Request the Requester will be contacted.



Before submitting a Purchase Order (PO) Request...

- All quotes are required to be on a company letterhead or can be an email where the signature of the vendor/company is in the email.
- Make sure quotes obtained in Mississippi **do not** include sales tax as we are a non-exempt agency. If a vendor/company asks for documentation, please contact procurement for MSDB's Tax Exempt Letter.
- Quotes with a date over thirty (30) days will not be accepted **unless** the quote states something to the affect of "*quote is good until a specified expiration date.*"
- Prepare a Purchase Requisition (PR) and obtain signature from the Director/Superintendent who is signing off to utilize the funds for purchase.
- Provide W9 if it is the first time MSDB is utilizing awarding vendor/company.
- DO NOT split quote requests to circumvent the threshold of the procurement process.
- Email all documents to procurement@msdk12.org.

Please DO NOT make a purchase or submit an invoice related to a purchase WITHOUT having a Purchase Order as this constitutes a purchasing violation with consequences!!!!!!



IT RELATED PURCHASES

- Any purchases related to computers, printers, software, hardware, malware anything technology related please contact **MSDB's IT Department** for assistance with regards to what is needed, if what you are requesting can be utilized, to assist with obtaining quotes, submissions, etc.



TRAVEL



Travel Procedures

- **First**, you must complete the Request For Travel Approval Form where you will input an **estimate** of your expected expenses and obtain signatures from your Principal/Director and Superintendent. Email the completed form to travel@msdbk12.org as this lets procurement know you are approved for travel. If you need a flight booked, procurement will email you directly for information and make flight arrangements for you.
- Make sure you keep a copy of all receipts, i.e., meals (must be itemized), lodging, registration fee(s), baggage claims, taxi/uber/lyft, etc. Keep all receipt(s) related to travel in which you will request a reimbursement. Alcohol cannot be included on the itemized receipt, and you can only get reimbursed up to 20% tip.
- If you are attending a conference/meeting, please make sure you print/make a copy of the agenda.
- If you are driving, please contact transportation to see if a school vehicle is available. If a vehicle is **available**, you will obtain a transportation credit card for gas. If a vehicle is **not available**, you will be reimbursed .625 cents per mile. If a vehicle **is available** and your wish is to drive your own vehicle you will be reimbursed .22 cents per mile. Also please make sure you print a google map, mapquest detailing directions from the school to the destination and back to the school as this is the total number of miles you will be reimbursed.
- Once you return from your trip please complete a Travel Reimbursement form, attach all receipts, agenda, Google Map or MapQuest, sign, date, obtain the Principal/Director's Signature and Date and submit all documents to procurement **within one (1) week after returning from the trip**. Procurement will review, notify you if any documents, etc. are needed, initial for approval and submit all documents to accounts payable to finalize for check reimbursement.

All Travel Forms are listed on the MSDB Website



**The Mississippi Schools for the Deaf and the Blind
Travel Reimbursement**

Travel Reimbursement Form must be completed and submitted within five (5) days after trip. Please complete all relevant sections.

Name: _____

Official Meeting Attended: _____

Location of Meeting: City _____ State _____

Date of Trip: Beginning _____ Ending _____

NOTE: Please attach all receipts

Date (month date/year)								Totals
Airfare (See Keshia Sanders)								\$
Meals (Overnight travel only)								\$
Lodging								\$
Conference Registration (if paid by employee)								\$
Transportation (Number of Miles): _____ x Current Rate <u>\$.625</u> per mile (Enter current applicable rate) <i>*If No District owned vehicle is available .625 per mile, If a District owned vehicle is available .22 per mile.</i>								\$
Other Expenses								\$
TOTAL REIMBURSEMENT REQUESTED								\$

Employee Signature: _____ Date: _____

Principal/Director Signature: _____ Date: _____

Chief Financial Officer: _____ Date: _____

Office Use Only:

Fund/GL Code



