

VOLUSIA COUNTY SCHOOLS

Purchasing Department

Purchasing Manual

Revised 2/2017

PURCHASING MANUAL

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FOREWARD

Purchasing is defined as the attainment of materials, supplies and services at optimum quality at the lowest possible price. It is one of the most important functions in the district. Our goal is to promote the district's best interest through professional purchasing processes, which will result in obtaining maximum value for each dollar spent.

In order to accomplish that goal, the purchasing function must be carried out uniformly and fairly. Rules and procedures must be adhered to at all levels throughout the District. This manual is designed to explain and facilitate understanding of the Purchasing organization, its functions, policies and procedures, and to serve as a tool in purchasing personnel training.

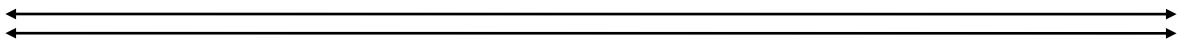
It is essential that all employees who are directly, or indirectly, involved in the purchase of goods and services have a clear understanding of their responsibility to uphold and maintain the School Board's reputation for fairness and integrity.

DISTRICT'S VISION STATEMENT

Ensuring all students receive a superior 21st century education.

(Approved 12/08/15)

Purchasing Department
MISSION STATEMENT



"To incorporate best industry practices and achieve economies of scale in the procurement of goods and services necessary for the effective and efficient operation of Volusia County Public Schools."

Adopted: 11/15/16

Purchasing Department

Procurement Values

- Accountability
- Ethics
- Impartiality
- Professionalism
- Service
- Transparency
- Integrity

Adopted: 12/1/2016

ETHICS IN PURCHASING

Ethics is a Greek word meaning “character, disposition or spirit”. The word ethical has become synonymous with decent, fair, just, proper, fitting and correct.

A good personal Code of Ethics is imperative for school personnel who perform the purchasing function. The employee who purchases goods and services for the district reflects his own reputation and the reputation of his school or school board through his dealings and contacts with customers and vendors. Each of us has a responsibility to maintain a high ethical standard of conduct and a reputation for courtesy and fair dealings. As a representative of the school district, in a purchasing capacity, a reputation of fairness and honesty is key to establishing a professional atmosphere in which decisions and evaluations are based on sound business judgment.

Each transaction shall be handled objectively, without favoritism or discrimination, and without seeking or dispensing personal favors. At no time, under any circumstances, should you accept directly or indirectly, gifts, gratuities or other things of value from a vendor.

The essence of purchasing ethics is to “do the right thing”.

THE DISTRICT PURCHASING DEPARTMENT SUPPORTS THE NATIONAL
INSTITUTE OF GOVERNMENTAL PURCHASING'S CODE OF ETHICS

National Institute of Governmental Purchasing

Code of Ethics

The Institute believes, and it is a condition of membership, that the following ethical principles should govern the conduct of every person employed by a public sector procurement or materials management organization.

- Seeks or accepts a position as head or employee only when fully in accord with the professional principles applicable thereto and when confident of possessing the qualifications to serve under those principles to the advantage of the employing organization.
- Believes in the dignity and worth of the service rendered by the organization and the societal responsibilities assumed as a trusted public servant.
- Is governed by the highest ideals of honor and integrity in all public and personal relationships to merit the respect and inspire the confidence of the organization and the public being served.
- Believes that personal aggrandizement or personal profit obtained through misuse of public or personal relationships is dishonest and not tolerable.
- Identifies and eliminates participation of any individual in operational situations where a conflict of interest may be involved.
- Believes that members of the Institute and its staff should at no time or under any circumstances accept directly or indirectly, gifts, gratuities, or other things of value from suppliers, which might or appear to influence purchasing decisions.
- Keeps the governmental organization informed, through appropriate channels, on problems and progress of applicable operations by emphasizing the importance of the facts.
- Resists encroachment on control of personnel to preserve integrity as a professional manager. Handles all personnel matters on a merit basis. Politics, religion, ethnicity, gender and age carry no weight in personnel administration in the agency being directed or served.
- Seeks or dispenses no personal favors. Handles each administrative problem objectively and empathetically without discrimination.
- Subscribes to and supports the professional aims and objectives of the NIGP - National Institute of Governmental Purchasing, Inc.

Procurement Policy Statement for Sponsor of National School Lunch and Breakfast Programs

Code of Conduct

This written Procurement Code of Conduct shall govern the performance and actions of School District (Sponsor) officers, school board members, employees, directors, volunteers or agents who are engaged in any aspect of procurement, contracts, grants, or the administration and supervision of contracts supported entirely or in part by federal entitlement funds disbursed by USDA. These regulations are found in 7 CFR Part 210.21 and Part 3016.36.

1. No employee, officer, director, volunteer or agent of the Sponsor shall participate in the selection, award or administration of a bid or contract supported by NSLP funds if a conflict of interest is real or apparent to a reasonable person.
2. Conflicts of interest may arise when any employee, officer, director, volunteer or an agent of the Sponsor has a financial, family, or any other beneficial interest in the vendor firm selected or considered for a bid award or contract.
3. No employee, officer, director, volunteer or agent of the Sponsor shall do business with; award contract to, or show favoritism toward a member of (his or her) immediate family, spouse's family or to any company, vendor or concern who either employs or has a relationship to a family member; or award a contract or bid which violates the spirit or intent of federal, state, and local procurement laws and policies established to maximize free and open competition among qualified vendors.
4. The Sponsor's employees, officers, directors, volunteers or agents shall neither solicit nor accept gratuities, gifts, consulting fees, trips, favors or anything having a monetary value more than ten dollars (\$10.00) from a potential vendor or bidder, or from any party to a sub-agreement or ancillary contract. (Example of an acceptable gift would be food product samples (may exceed \$10.00 value) when used to benefit the Sponsor and students; or personal gift or meal valued at less than \$10.00 which is not intended to influence a procurement award or decision.)
5. As permitted by law, rule, policy or regulation, the Sponsor shall pursue appropriate legal, administrative or disciplinary action against an employee, officer, director, volunteer, vendor or vendor's agent who is alleged to have committed, has been convicted of or pled no contest to a procurement Child Nutrition-related infraction. If said person has been convicted, disciplined or pled no contest to a procurement violation, said person shall be removed from any further responsibility or involvement with grants management, procurement or bids, consistent with school board, state or federal policy.

"In accordance with Federal Law, and US Department of Agriculture policy, this institution is prohibited from discriminating based on race, color, national origin, sex, age, or disability. To file a complaint of discrimination write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, DC 20250-9410, Mail Stop 0115 or call 800-795-3272 or (202) 720-3808. USDA is an equal opportunity provider and employer." You can also visit the website below.
<https://www.ascr.usda.gov/contact-us>

FISCAL MANAGEMENT POLICIES

NUMBER 702

PURCHASING

The purchase of products and services by the School District of Volusia County shall be authorized by state law and must be in accordance with procedures prescribed by the school board.

I. Definitions

- A. “Competitive solicitation” shall be defined for the purposes of this policy to include purchases made through the issuance of an invitation to bid, request for proposals, and invitation to negotiate.
- B. “Invitation to bid” shall be defined for the purposes of this policy as a written solicitation for competitive sealed bids. The invitation to bid is used when the district is capable of specifically defining the scope of work for which a contractual service is required or when the district school board is capable of establishing precise specifications defining the actual commodity or group of commodities required. A written solicitation includes a solicitation that is publicly posted.
- C. “Request for proposals” shall be defined for the purposes of this policy as a written solicitation for competitive sealed proposals. The request for proposals is used when it is not practicable for the district to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required and when the district is requesting that a responsible vendor propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document. A written solicitation includes a solicitation that is publicly posted.
- D. “Invitation to negotiate” shall be defined for the purposes of this policy as a written solicitation for competitive sealed replies to select one or more vendors with which to commence negotiations for the procurement of commodities or contractual services. The invitation to negotiate is used when the district determines that negotiations may be necessary for it to receive the best value. A written solicitation includes a solicitation that is publicly posted.
- E. “Request for Quotation (RFQ)” shall be defined for the purposes of this policy as a written request for competitive quotes. This procurement method is used when the district is capable of specifically defining the scope of work for which a contractual service is required or when the district is capable of establishing precise specifications defining the actual commodity or group of commodities required. A written solicitation includes a solicitation that is publicly posted.
- F. “Grants” shall be defined for the purposes of this policy as a grant award contribution, gift, or subsidy (in cash or in-kind services) bestowed by a government, foundation or other funding organization (called the grantor) for

specified purposes to an eligible recipient (called the grantee). Grants are usually conditional upon certain qualifications as to the use; maintenance of specified standards, use of specified or approved vendors and/or products and may or may not require proportional (matching) contribution by the grantee or other grantor(s).

- G. “Proposer” shall be defined for the purposes of this policy to include those vendors submitting bids or responses to a competitive solicitation.
- H. “Reverse auctions” shall be defined as an innovative technology tool used to drive down the prices of commodities and contractual services. Real time, on-line bidding ends at a specified time or when cost becomes too low for profit.
- I. “Superintendent” shall be defined for the purposes of this policy to mean “superintendent or designee”.
- J. “Contract” shall be defined for the purpose of this policy to mean an agreement between two or more parties that is intended to have legal effect. Contracts document the mutual understanding between the parties as to the terms and conditions of their agreement, contain mutual obligations, and clearly state the cost of the services or products to be provided by the vendor or service provider and any other obligations. All contracts shall be in the name of the “The School Board of Volusia County, Florida.” Subsequent reference may be made to the individual school or department in a manner such as the following: “The School Board of Volusia County, Florida, o/b/o [insert name of school or department].”

II. Authority

- A. The superintendent is authorized to expend monies for purchases of commodities and contractual services where the total is less than \$50,000 consistent with rule 6A-1.012, Florida Administrative Code that may be purchased without the bid process and which otherwise would be exempt from bidding by state law. The purchases are not to exceed the applicable appropriation in the district’s budget and shall be made in accordance with Board policy.
- B. No person, unless authorized to do so under the policy of the district school board, may make any purchase or enter into any contract involving the use of district and/or school funds, including internal accounts. No expenditures for any such unauthorized purchase or contract shall be approved by the school board. The payment for any unauthorized purchase or contract shall be the sole responsibility of the person placing the order or entering into such contract.
- C. Before making any purchase of commodities or contractual services, which the superintendent is authorized by the school board to make, or before recommending any purchase to the board, the superintendent shall, insofar as possible, propose standards and specifications. The superintendent shall see that all purchases and contracts conform to those standards and specifications, and shall take other such steps as are necessary to see that maximum value is being received for any money expended.

D. Superintendent/Designee Authority

The Superintendent is further authorized to delegate the authority to execute a contract, or approve the individual expenditure of funds through other purchasing methods, for goods and services, to the following individuals and corresponding limits:

1. School principals: not to exceed \$10,000.00. This limit may be extended up to \$19,999.99 when approved in writing by the area superintendent for that school or the superintendent.
2. District directors (other than the Director of Purchasing): not to exceed \$10,000.00. This limit may be extended up to \$19,999.99 when approved in writing by a cabinet member or the superintendent.
3. Cabinet members: not to exceed \$19,999.99.
4. Superintendent or designee: not to exceed \$49,999.99.

Authority under this section shall comply with any applicable competitive solicitation requirements set forth in section IV of this policy. The limits contained within paragraph D do not apply to the administration of claims and settlements of the district's self-insurance liability programs, which are established by separate action of the Board, or authorized expenses related to the defense of said claims or litigation under the district's self-insurance programs when provided under contracts previously approved by the Board.

E. All purchases of commodities and contractual services with a value of \$50,000.00 or more shall be authorized by the School Board with the following exceptions:

1. Emergency purchases consistent with the requirements of rule 6A-1.012(12) (e), Florida Administrative Code.
2. Contracts for commemorative items that are purchased as a service to students and where substantially all of the costs of the contract will be recouped from students. Examples include, but are not limited to, class rings, caps and gowns, yearbooks, school pictures, graduation cards and announcements.
3. Contracts for the purchase of gasoline and/or diesel fuel in order to allow the school district to obtain the best prices available, provided the superintendent has given notice to the members of the school board. The board shall ratify the contract at the next regular meeting of the board.

F. Contract Review

All contracts with a value exceeding \$19,999 shall be reviewed and approved by the Director of Purchasing and/or Chief Counsel for legal sufficiency and

compliance with Board policy unless a lower threshold is directed by the Superintendent.

G. Form of Contract

All contracts shall be in written form.

III. Methods of Purchase/Requisitions

- A. Insofar as practicable, all purchases shall be based on contracts, purchasing card systems, electronic procurements, or purchase orders. Within the dollar thresholds identified in section II.D. of this policy, the Superintendent, and/or designees identified therein, shall be authorized to approve purchases under rules set by the Board, provided that in so doing, he or she shall certify that funds to cover the expenditures are authorized by the budget and have not been encumbered.
- B. Each requisition shall be properly financed, budgeted prior to the issuance of a purchase order. The acquisition of the commodities or contractual services shall not precede the requisition date.
- C. Splitting of Requisitions and/or Purchase Orders: Districts may not divide the procurement of commodities or contractual services so as to avoid the monetary threshold requirements set by law or policy.
- D. The Superintendent may utilize any appropriate electronic methods, such as procurement cards, to purchase commodities and contractual services as deemed to be in the best interest of the district and consistent with other parts of this policy.
- E. In addition to the traditional competitive bid methods, reverse electronic auctions, (eAuctions) may be used to acquire commodities or services when it is advantageous for the district and significant cost savings may be realized.

IV. Competitive Solicitations

- A. Competitive solicitation threshold requirements. The following standards for acquiring commodities and contractual services will be established by the district at the following dollar limits:
 - 1. Small Purchases (up to \$9,999.99)

Goods and services under \$9,999.99 are purchased on the open market. The superintendent has the authority to change selected vendors if it is in the District's best interest to do so. The District's purchasing card is encouraged for all expenditures as outlined in the Purchasing Card User's Manual.
 - 2. Informal Quotes (\$10,000.00 to \$19,999.99)

Goods and services from \$10,000.00 to \$19,999.99 are purchased after securing a minimum of three (3) written quotes from selected vendors. A copy of the written quotes shall be forwarded to the Purchasing Department at the time the requisition or request to purchase is made. The superintendent has the authority to change selected vendors if it is in the District's best interest to do so.

3. Requests for Quotation RFQ (\$20,000.00 to \$49,999.99)

Goods and services from \$20,000.00 to \$49,999.99 are purchased after requesting a formal Request for Quotation. The Purchasing Department shall obtain written competitive quotes from a minimum of three (3) qualified vendors. The Purchasing Department will review the responses and select the lowest and best responsive and responsible quotation received.

4. Requests for Formal Sealed Competitive Solicitations \$50,000.00 or greater)

Purchases for amounts \$50,000.00 or greater are acquired through formal sealed competitive solicitations, with the exception of sole (single) source vendors, emergency purchases, or other purchases which are expressly exempted from the competitive solicitation process by law (see Section V – Exceptions to Competitive Solicitations).

B. Maintenance of the Bidders List:

1. The Purchasing Department shall maintain a list of all potential bidders by category of commodity or service and shall include the names of all persons or firms that requested placement on the list.
2. Should a vendor fail to respond to a request for bid or proposal, the Purchasing Department may remove that vendor's name from the bid mailing list, for future bids concerning that commodity.
3. The Director of Purchasing may remove the name of any person or firm from the list based upon prior documented unsatisfactory experience with the person or firm. However, the person or firm may apply to the Director of Purchasing for reinstatement to the vendor list after being removed for one (1) year. The decision regarding reinstatement shall be at the discretion of the Director of Purchasing.

C. Competitive solicitations shall be requested by the superintendent from a minimum of three (3) sources for any authorized purchase or contract for services exceeding the maximum amount allowed by law, which are not otherwise exempt from bidding by Florida law.

D. Preference to Florida businesses. Competitive solicitations mandated by state law shall be subject to the requirements of section 287.084, Florida Statutes, relating to Florida businesses.

E. Resolution of Bid Protests:

The School Board hereby adopts the procedure specified in Florida Statutes, section 120.57(3) for the resolution of bid protests subject to the following requirements and exceptions:

1. District Notice of Decision or Intended Decision

a. The Notice of Intended Decision shall be electronically posted by the Purchasing Department.

b. The District's Notice of Intended Decision shall contain the following statement:

"Failure to file a protest within the time prescribed in section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under chapter 120, Florida Statutes."

2. Notice of Protest

a. Any person who is adversely affected by the agency decision or intended decision shall file with the Director of Purchasing as agent for the School Board a notice of protest in writing within 72 hours after the posting of the notice of decision or intended decision. With respect to a protest of the terms, conditions and specifications contained in a solicitation, including any provisions governing the method of ranking, bids, proposals or replies, awarding contracts, reserving of rights to further negotiations or modifying or amending any contracts the notice of protest shall be filed in writing within 72 hours after the receipt of notice of the project plans and specifications or intended project plans and specifications in an invitation to bid, invitation to negotiate, or request for proposals.

b. The notice of protest must actually be received by the Purchasing Department before the 72 hour period expires. The 72 hour period excludes Saturdays, Sundays, holidays and all other days when the District office is closed. The 72 hour period is not extended by service of the notice of protest by mail.

c. The notice of protest shall identify the procurement by solicitation number and title or any other language that will

clearly enable the District to identify it; and it shall state the person intends to protest the decision.

- d. Failure to file a notice of protest or failure to file a formal written protest shall constitute a waiver of proceedings under chapter 120, Florida Statutes.
- e. The School Board may, in its discretion, waive any procedural irregularity or defect in procedures so long as any opposing party is not materially prejudiced by such waiver.

3. Formal Written Protest

The protester shall file a formal written protest within ten (10) days after the date the notice of protest is filed, excluding Saturdays, Sundays, holidays and all other days the District office is closed. The 10 day period for filing the formal written protest is not extended by service of the protest by mail. The formal written protest shall state with particularity the facts and law upon which the protest is based. Failure to file a formal written protest shall constitute a waiver of proceedings under chapter 120, Florida Statutes.

4. Staying the Procurement Process

Upon receipt of the formal written protest that has been timely filed, the School Board shall stop the solicitation or contract award process until the subject of the protest is resolved by final agency action, unless the School Board, sets forth in writing the particular facts and circumstances which require the continuance of the solicitation or contract award process without delay in order to avoid an immediate and serious danger to the public health, safety or welfare.

5. Posting the Bond

Any person who files a timely request for an administrative hearing under paragraph 7 shall post with the Director of Purchasing, a bond, payable to the School District of Volusia County, Florida, in an amount equal to one percent (1%) of the estimated total value of the contract; or \$20,000.00, whichever is greater. The bond shall be conditioned on the payment of all costs, which may be adjudged against the protester in an administrative hearing in which the action is brought and in any subsequent appellate court procedures. If, after the completion of the administrative hearing process and any appellate court proceedings the school district prevails, then the school district shall recover all costs and charges which shall be included in the final order or judgment, including charges made by the division of administrative hearings, but excluding attorney's fees. Upon payment of such costs and charges by the protester, the bond shall be returned. If the protester prevails then the protester shall recover from the school district all costs and charges,

which shall be included in the final order or judgment, excluding attorney's fees.

6. Informal Resolution

The Director of Purchasing shall schedule an informal meeting to attempt to resolve the protest by mutual agreement between the parties within seven (7) days, excluding Saturdays, Sundays, holidays and all other days the District office is closed, after receipt of the formal written protest. All affected parties shall be notified of the Notice of Protest.

Should the disputed issue not be resolved by mutual agreement of the Director of Purchasing and the protester, the protester must file with the Director of Purchasing a notice of intent for administrative hearing within seven (7) days of the informal meeting, excluding Saturdays, Sundays, holidays and all other days the District office is closed. If no timely notice of intent for administrative hearing is received by the Director of Purchasing, the protest shall be deemed dismissed with prejudice.

7. Hearing

If the protest is not resolved informally the aggrieved party may file a formal written protest for an administrative hearing (if such request was not already included in the formal written protest). All procedures as delineated in Florida Statute 120.57(3) shall be followed.

- F. The Notice of Intended Decisions shall be presented to the school board for approval before any monies are expended. The school board shall have the authority to reject any or all proposals submitted in response to any competitive solicitation and to request new proposals or to purchase the required commodities or contractual services in any other manner as authorized in this policy.

In acceptance of responses to competitive solicitations, the district may accept and award contracts to one or more responsive, responsible proposers in accordance with the selection criteria published in the solicitation. As an alternative, the School Board may also choose to award contracts to the lowest responsive, responsible bidder(s) as the primary awardee of a contract and to the next lowest responsive, responsible bidder(s) as alternate awardees from whom commodities or contractual services would be purchased should the primary awardee become unable to provide all the commodities or contractual services required by the district during the term of the contract. Nothing herein is meant to prevent multiple awards to the lowest responsive and responsible bidders when such multiple awards are clearly stated in the bid solicitation documents.

- G. Cone of Silence Period

Communication by any party that has submitted a response to a competitive solicitation to any Board member or district employee after the Purchasing Department releases the solicitation to the general public is prohibited until the notice of intended decision is posted by the Director of Purchasing unless otherwise permitted in this paragraph. Communication by any party that has submitted a response to a competitive solicitation that is substantiated by the Superintendent in violation of this paragraph may result the rejection of the proposal by the district. Any communication by a party that has submitted a proposal in response to a competitive solicitation may only communicate with the purchasing department during this period.

- H. If identical low and best bids are submitted the following criteria shall be utilized to determine which vendor shall be recommended for the awarding of the bid.
 - 1. Certification under Florida Statutes as a drug-free workplace.
 - 2. In-county preference.
 - 3. Company receiving larger dollar award of the bid.
 - 4. Coin toss.

- V. Exceptions to Competitive Solicitations

The District may waive the requirements for competitive quotes or solicitations for the purchase or acquisition of commodities and contractual services stated below, and/or in the following circumstances:

- A. Educational Materials: educational services and any type of copyrighted materials including, without limitation, educational tests, textbooks, printed instructional materials, computer software, films, film strips, videotapes, dvds, disc or tape recordings, digital recordings, or similar audio-visual materials, and for library and reference books and printed library cards where such materials are purchased directly from the producer or publisher, the owner of the copyright, an exclusive agent within the state, a governmental agency or a recognized educational institution.

- B. Emergency Purchases: Notwithstanding this policy, emergency purchases are authorized when consistent with the requirements of rule 6A-1.012(12)(e), Florida Administrative Code.

- C. Contracts for commemorative items that are purchased as a service to students and where substantially all of the costs of the contract will be recouped from students. Examples include, but are not limited to, class rings, caps and gowns, yearbooks, school pictures, graduation cards, and announcements.

- D. Gasoline and Diesel: In order to allow the school district to obtain the best prices available, the superintendent shall be authorized to enter into contracts for

the purchase of gasoline and/or diesel fuel, and such contracts shall not require school board approval, provided the superintendent has given notice to the members of the school board. The board shall ratify the contract at the next regular meeting of the board.

- E. Grants or State or Federal Agency Contracts: A contract for commodities or contractual services may be awarded without competitive solicitations if state or federal law, a grant or a state or federal agency contract prescribes with whom the district school board must contract or if the rate of payment is established during the appropriations process.
- F. Information Technology Resources: The District when acquiring, whether by purchase, lease, lease with option to purchase, rental or otherwise, information technology as defined in section 282.0041(15), Florida Statutes, may make any acquisition through the competitive solicitation process as described herein or by direct negotiation and contract with a vendor or supplier, as best fits the needs of the district as determined by the school board.
- G. Insurance and Risk Management: Except as otherwise required by statute, the school board when purchasing insurance, entering risk management programs, or contracting with third party administrators, may make any such acquisitions through the competitive solicitation process as described herein or by direct negotiations and contract.
- H. No Response(s) Received From Solicitations: The requirements for requesting competitive solicitations for commodities and contractual services from three (3) or more sources is hereby waived, as authorized by section 1010.04(4)(a), Florida Statutes, and the superintendent may enter into negotiations with suppliers of such commodities and contractual services and shall have the authority to execute contracts with such vendors under whatever terms and conditions the District determines to be in its best interest, when the following conditions are met:
 - 1. Competitive solicitations have been requested in the manner prescribed by this policy, and
 - 2. The School Board has made a finding that no valid or acceptable firm proposal has been received within the prescribed time.
- I. Purchases Under Other Contracts:
 - 1. The District may, in lieu of requesting competitive solicitations from three (3) or more sources, make purchases at or below the specified prices from contracts awarded by other city or county governmental agencies, other district school boards, community colleges, federal agencies, public or governmental agencies of any state, state university systems, or other cooperative agreements, when the proposer awarded a contract by another entity defined herein will permit purchases by the School Board at the same or better terms and conditions, and prices at or

below those awarded in such contract, and such purchases would be to the economic advantage of the Board.

2. The District shall receive and give consideration to the prices available to it under rules of the Department of Management Services, Division of Purchasing. The district may use prices established by the Division of Purchasing through its state purchasing agreement price schedule with the same or better terms and conditions, for use by those imposed on state agencies.
- J. Pool Purchases: Competitive solicitations are not required for purchases made through the pool purchase provisions of section 1006.27, Florida Statutes.
- K. Food & Food Products, Except Milk: may be purchased without competitive solicitations. Milk may be exempt under the following conditions: (a) The district has made a finding that no valid or acceptable firm bid has been received within the prescribed time; or (b) The district has made a finding that an emergency situation exists and may enter into negotiations with suppliers of milk and shall have the authority to execute contracts under whatever terms and conditions as the board determines to be in the best interest of the school system. Procedures shall be established to assure that all food purchased conforms to the federal food, drug and cosmetic act, the federal meat inspection act, and the meat inspection law of Florida, and any other federal or state safeguards relating to wholesomeness of specific items being purchased.
- L. Professional Services: which shall include, without limitation, artistic services; academic program reviews; lectures by individuals; auditing services not subject to section 218.391, Florida Statutes; legal services, including attorney, paralegal, expert witness, court reporting, appraisal or mediator services; and health services involving examination, diagnosis, treatment, prevention, medical consultation or administration.
- M. Single Source Suppliers
1. Commodities or contractual services available only from a single source may be exempted from the competitive solicitation requirements when the school district believes that the commodities and contractual services are available only from a single source. The district shall electronically or otherwise publicly post a description of the commodities or contractual services sought for a minimum of seven (7) business days. The description must include a request that prospective vendors provide information regarding their ability to supply the commodities or contractual services described, and
 2. If it is determined, in writing by the district, after reviewing any information received from prospective vendors, that the commodities or contractual services are available only from a single source, the district shall provide notice of its intended decision to enter a single source contract in the manner specified in section 120.57(3), Florida Statutes,

and may negotiate on the best terms and conditions with the single source vendor.

- N. Sole Proposals: If less than two (2) responsive proposals for commodity or contractual services are received, the district may negotiate on the best terms and conditions, or may elect to reject all proposals. The district shall document the reasons that negotiating terms and conditions with the sole proposer is in the best interest of the district in lieu of resoliciting proposals.
- O. Utilities or Governmental Franchised Services: A contract for regulated utilities or government franchised services may be awarded without competitive solicitations.

VI. Small Business Opportunity

The purchasing department will actively recruit small businesses capable of supplying the goods and services necessary to operate our school system. The school board will publish on its Purchasing website a Vendor's Guide outlining the procedures by which to become a qualified bidder and the prerequisites for placement on the bidder mailing list. The Purchasing Department will initiate or participate in seminars and training sessions to familiarize small business owners with school board purchasing policies and procedures. These programs will provide opportunity for and encourage small businesses to participate in the district-purchasing program.

VII. Conflict of Interest

The provisions of F.S. 112.313 shall apply regarding conflict of interest. Any violation of these provisions by a school board employee may be grounds for disciplinary action.

VIII. Public Records

All competitive solicitations shall be subject to the public records requirements of state law or rule, including section 119.071(b), Florida Statutes.

IX. Implementation

The Superintendent may implement the terms of this policy as deemed appropriate by manual or procedures.

Legal Authority:

Section 1001.41(2), Florida Statutes

Laws Implemented:

Sections 1001.43(2), 1001.42(12)(j), 120.53(5) 120.57(1), 255.04, 287.057, 287.073(4) 287.087, Florida Statutes
State Board of Education Rules, 6A-1.012, 6A-1.013, 6A-1.091, 6A-7.042(5)(g), Florida Administrative Code

References:

(Food Services Manual)
(Purchasing Manual)
(Purchasing Card Manual)

History:

(Adopted -- December 17, 1974)

(Revised -- September 14, 1982; August 23, 1988; October 24, 1989; April 26, 1994;
April 8, 1997; April 14, 1998; January 13, 2004; July 28, 2009; April 28, 2015)

(Effective Date -- April 28, 2015)

WORKER'S COMPENSATION CLAIMS

The following procedure is to be followed if an injury occurs during working hours.

1. Employee is to report the incident (injury) to their immediate supervisor as soon as possible after the accident occurs.
2. A Comprehensive Accident Report must be completed by the supervisor in its entirety, within 24 hours of the accident and forwarded to the Safety Services Department. The report will include all pertinent details of the accident -- date, time, place, extenuating circumstances, witnesses, etc.
3. A First Report of Injury Form is to be completed by the supervisor whether or not medical attention is sought. The information must be correct and detailed. A copy of the Comprehensive Accident Report is to be attached to the First Report of Injury report. These reports are to be forwarded to the Insurance and Employee Benefits Department.
4. If medical attention is required the supervisor must complete and sign the Worker's Compensation Medical Authorization for Treatment Form. This form is to be forwarded to the Insurance and Employee Benefits Department.

IN THE EVENT OF A SERIOUS INJURY THE EMPLOYEE'S SAFETY AND TREATMENT IS OUR FIRST CONCERN. REQUIRED PAPERWORK WILL BE PROCESSED AFTER THE EMERGENCY IS PROPERLY HANDLED.

SAFETY IS EVERYONE'S RESPONSIBILITY!

SCHOOL AND DEPARTMENT RESPONSIBILITIES

Spending Threshold

All schools and departments must abide by the purchasing policies established by the Board in Fiscal Management Policy 702. Dollar limits, as set forth by the Board, are to be strictly adhered to. Currently, authorized purchases up to \$9,999.99 can be purchased with or without competition; \$10,000 to \$19,999.99 require a minimum of three (3) written price quotes prior to making the purchase. Purchases that cost between \$20,000 and \$49,999.99 require a Purchasing Department competitive quote and anything costing \$50,000.00 or more requires a competitive sealed solicitation from the Purchasing Department and School Board approval in order to be valid. Contact the purchasing department for items requiring a competitive quote and/or bid. Purchases cannot be split in order to circumvent a dollar limit established by policy.

Purchase Requisitions - Training Classes for On-Line System

It is the responsibility of the schools and departments to make certain that staff who will be entering on-line purchase requisitions receive the proper training prior to attempting data entry. Training classes for the Purchasing/Warehouse modules are scheduled each month by the Purchasing Department. **Please call Ext. 50855 to get signed up for the next available purchasing class.** To provide better service to your school, it is strongly recommended that each school who has a 12-month office employee provide purchase requisition training for that individual. Each school/department should have a minimum of two people trained on how to enter requisitions. In that way, if your primary requisitioner is absent, you will have a backup person who can enter requisitions for your school or department.

The Purchasing Department provides instructions on how to use the **On-Line Purchasing & Warehouse System to generate requisitions.** The guide is distributed at the computer training sessions and provides step-by-step instructions on how to enter a requisition. **If you need additional help, contact the Purchasing Department at Ext. 50855.**

Requisitions which have been successfully entered and saved to a status of "New: PApprv" will be forwarded to Finance for verification of the funding (Account String). After approving the requisitions, Finance will forward the requisitions (now in a status of "Open:Appr") to the Purchasing Department for cloning into a purchase order. If the requisition is approved by Purchasing, it will be cloned and printed the next day for distribution. After the purchase order is printed, it will be in "SENT" status. If the requisition was entered correctly, schools and departments will be able to view their purchase orders on-line within a minimum of a 48 hour turn-a-round. If you have attachments that need to be mailed or faxed to the vendor, you must make your requisition a "NO MAIL". The "NO MAIL" status tells the Purchasing Department to send the purchase order back to the person who entered the requisition (the "Requester") instead of mailing it directly to the vendor. The school or department is responsible for mailing or faxing to the vendor any purchase order that is returned to them marked "NO MAIL".

SCHOOL AND DEPARTMENT RESPONSIBILITIES

On-Line Receipt of Goods

1. Packing lists should be included in each shipment you receive and should show the purchase order, bid number (if there is one), school/department name, contents, and the shippers' name and address. There should be sufficient detail so you can identify what was delivered, if not, contact the vendor who shipped the goods to request a packing slip.
2. When materials are received, check to ensure the shipment belongs to your school. Items shipped and the packing list should match all items on your purchase order. Any back ordered items should be noted. **The school/department is responsible for receipting each item into the system. RECEIPT ONLY THE ITEMS YOU ACTUALLY RECEIVED.** If you receipt the entire purchase order and you did not take delivery of all of the items, Finance will pay for items you did not get if they have an invoice and it matches the quantity that you receipted.
3. Check each item to ensure the brand, size, color or any other pertinent information is as ordered. No substitutions are acceptable -- unless changes were made between purchasing, school and company prior to delivery. The purchase order **MUST** match what was actually received.
4. If there is noticeable damage to the package, have the carrier note the damage on all copies of the shipping ticket and have the carrier sign, leaving a copy at your school/department. Refuse the shipment if the damage is significant. All damaged goods must be kept at the school site in the original shipping box until vendor has inspected and replaced goods to comply with original order.

In the event an item(s) is received and unpacked later, within 10 days after delivery, and there is concealed damage, the item(s) may be replaced by the vendor at no cost to the school/department if you notify the vendor in a timely manner. It is the school/departments responsibility to contact the vendor in writing regarding such damage.

5. If a shortage occurs during delivery, the truck driver should note the shortage on your copy of the shipping ticket and sign his name.
6. If the shipment arrives short of the number of items stated on the shipping tickets, the vendor should immediately be informed of 1) the shortage, 2) the shipping company (truck line, UPS, etc.) and 3) the shipping ticket number so that a tracer can be put on the missing item(s).
7. **All invoices are to be sent directly to Finance.** When Finance receives an invoice from the vendor, they will enter the invoice into the on-line system. When items have been received against the purchase order, a three-way match takes place. The system will check to see that the 1) purchase order, 2) receipt and the 3) invoice all match before it releases it for payment.
8. **Changes to Purchase Order:** If there are any changes to be made on the purchase order, such as substitutions, price or quantity changes, deletions, etc., the school must notify the Purchasing Department. Refer to <http://myvolusiaschools.org/purchasing/Pages/Home.aspx> for contact information. Purchasing will do a purchase order change request making all necessary changes. Purchasing is also responsible for handling all cancellations of a purchase order line or of an entire purchase order.
9. **Changes to an Account String:** Finance will handle all changes needed to an account string for a purchase order. Email Finance at their global address "Finance" for assistance in getting a string line changed on a purchase order.

SCHOOL AND DEPARTMENT RESPONSIBILITIES

Other Responsibilities of Schools and Departments:

1. To enter your on-line requisitions in a timely manner to allow ample time for Finance and Purchasing to process and mail your purchase orders, and for the vendors and suppliers to make deliveries of the items you requested by the date you need them.
Note: Do not split requisitions/purchase orders in order to avoid dollar limits as prescribed by Fiscal Policy 702. Requisitions should be entered for the exact amount of the purchase, and not be entered at a lower dollar amount to avoid quotes and/or bid threshold amounts set by the Board.
2. To provide assistance to the Purchasing Department when preparing bid specifications and or seeking quotes that require a technical or engineering background for the items and/or services you require.
3. To list anticipated requirements in advance, when requested to do so. (Such as Capital Outlay Projects, district-wide replacement equipment, etc.)
4. To keep the Purchasing Department advised of any abnormal demands--examples, emergency orders, budget time-frames, district-wide curriculum purchases, very large warehouse orders, etc.
5. To refrain from committing the school district to purchase from a particular vendor prior to the release of a purchase order. **Under no circumstances is a school or department to obligate in any manner whatsoever the Purchasing Department to any supplier or vendor for the purchase of any item or items they are considering buying.**
6. To communicate with the Purchasing Department by reporting product usage and/or service results, either favorable or unfavorable. The Product Evaluation Form is used for this purpose. This information will be used when evaluating which vendor or items to consider for future purchases. If you don't tell us – we won't know how you feel about items being stocked in the warehouse or bought for your school.
7. To communicate with the Purchasing Department by completing a Report of Unsatisfactory Service to report complaints and/or discrepancies on vendor performance.
8. To advise the Purchasing Department of any known qualified suppliers to be added to our bidder's database.
9. To cooperate with the Purchasing Department to secure the necessary products and services required to operate our schools and departments efficiently.
10. **To avoid “stock-piling” items kept in the Warehouse.** It is not cost effective to maintain inventories of items that you will not be using within a short period of time. Orders placed with the warehouse can be delivered to your school/department normally within three (3) days. Stock-piled items have a tendency to deteriorate before they are used. So don't waste your budget dollars – order only what you will use in a reasonable length of time.

SCHOOL AND DEPARTMENT RESPONSIBILITIES

VISA PURCHASING CARD PROGRAMS

The district has a board approved purchasing card policy to supplement the purchase order process for small dollar purchases. The program has two distinct cards being issued. One is for county funds and the other is for internal accounts money.

District's Purchasing Card Program – managed by Finance and Purchasing

The purchasing card program was implemented in 1998 as an additional method by which to procure goods and services that meet the requirements of the district's purchasing policies. Since the program was implemented in 1998, the district has reduced the number of paper purchase orders processed by over 60 percent. Purchasing cards provide schools and departments immediate access to necessary goods and services without having to process a paper purchase order. All purchasing policies remain in effect when using the card – if a purchase is not allowed with a purchase order, it will not be allowed using the card. The purchasing card program is designed to manage, control and monitor expenditures within specific dollar limits.

The program is designed to handle most small items costing less than \$750.00. Principals and Department Heads are responsible for the cards issued to their employees. Dollar limits for single and monthly transactions amounts are determined for each cardholder based on their job responsibilities within the district. Schools and departments are responsible for reconciling their charges in a timely manner using the on-line system supported by Finance in order to make prompt payments to the bank.

Any help needed regarding the reconciliation process (how you post and pay for your charges) should be directed to your Finance Department contact person. Any help needed to change limits on our pcards, request a new card, request a PIN, report a card lost or stolen, or to ask for a card to be cancelled, please contact the Purchasing Department.

Additional information can be found in the **District's Purchasing Card Manual** located on the Finance Departments' website.

It is the responsibility of schools and departments to settle their monthly statements in a timely manner. If statements are repeatedly late to finance, purchasing cards may be collected and cancelled by the Director of Purchasing. All fiscal policies and procedures apply to charges being made on a district purchasing card.

FINANCIAL TRANSACTIONS

SALE OF OBSOLETE FURNITURE AND EQUIPMENT – Surplus Warehouse

FURNITURE AND EQUIPMENT:

A school or department cannot sell obsolete furniture and equipment. With the approval of the Coordinator of Purchasing, equipment can be used as a trade-in to reduce the purchase price of new equipment. The trade-in value should be checked to insure we are receiving fair market value for the item being used as a trade-in.

When a school or department determines it has excess furniture or equipment on site, it may have these items picked up by the warehouse crew and removed from their inventory. The on-line entry of a pick-up request notifies the warehouse that these items are available and ready for pick-up. Click on <http://shaggy/applications/appportal/default.aspx>, select **“Equipment Pick up and Transfer Request Form”**. Fill in the property ID numbers, the reason you want the item picked up, and a description of the item (example: 4-drawer lateral file cabinet) you want picked up. When you have entered all items, click on the submit button to send your request to the warehouse. **The items are to be ready for pickup at the time you submit your request.** It is important that more than one person be aware of what items are scheduled for pickup so that if the person who submitted the request is absent, someone else can locate and identify the items to be picked up by the warehouse crew.

Excess furniture and equipment, when found to be reusable in the district, is taken to the Deland Warehouse, located at 1301 Shapiro Drive, Deland FL, for storage. These items are first offered to the schools and departments at no cost. After this opportunity, the items can be sold to the public or to school board employees on a first-come first-served basis. Items with a value under \$5,000.00 will be offered for sale using a competitive quote or through the auction; items with a property value over \$5,000.00 will be offered through competitive auction; click here for the link: <http://www.ggauctionsonline.com>

VEHICLES:

School Board vehicles are deleted from our inventory and usually sold through a competitive auction process. Contact the Transportation Department if you need information regarding the disposal of a district-owned vehicle.

FINANCIAL TRANSACTIONS

SCHOOL ACTIVITY FUNDS: INTERNAL ACCOUNTS

Internal Accounts are funds raised by a school to finance activities *not* funded by the district. These funds are generated from activities such as:

- School Supply Fees
- Cash Donations
- Ticket Sales to Athletic Events
- Fund Raisers (Dinners, Etc.)
- Sale of Yearbooks and Pictures
- Rental of Locks for Lockers
- Sale of School Supplies
- Vended Product Sales on Campus

All district purchasing policies, such as price quotes and bidding requirements, must be followed when expending money from an internal account fund. Compliance with these policies is the responsibility of the District's Finance Department. **Purchases are not to be "split" in order to avoid dollar limits, as specified by the School Board in Fiscal Policy 702.**

Each school issues a check from their Internal Accounts checking account system to pay for invoices generated by purchases made from this funding source.

Warehouse items ordered and being paid for using internal accounts funds are billed back to the school via the Warehouse-generated pick ticket. The school then issues a check written from their Internal Accounts checking account to reimburse the district for the cost of the supplies ordered from the warehouse.

Each school has been issued a distinct district purchasing card to be used strictly for internal accounts purchases. Upon printing and verifying the monthly report totals in Works (District's purchasing card reconciliation software), the school will reimburse the district by the 10th of each month for all charges made to their Internal Accounts purchasing cards.

CONTACT THE FINANCE DEPARTMENT IF YOU HAVE ANY QUESTIONS REGARDING THE POLICIES GOVERNING INTERNAL ACCOUNTS FUNDS.

REQUISITION/PURCHASE

THE PURCHASING PROCESS

This section of the Purchasing Manual covers several distinct areas of the process used to order and receive goods and services for the school district.

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REQUISITION/PURCHASE

THE PURCHASING CYCLE

A need is:

Recognized, Perceived, or Indicated

Specifications are Determined

On-Line Requisition is Generated

Finance Approves Requisition

Purchasing Reviews Specifications on
the Requisition for Accuracy and Completeness

If Accurate and Complete, Purchasing Checks to See if Available from
Warehouse or Excess from Other Schools/Departments

If Not, Purchasing Determines Method of Purchase

If required by Policy, Purchasing Secures Quotations, Bids, or Proposals

Purchasing Receives and Tabulates Quotations, Bids, or Proposals

Purchasing Evaluates Quotations, Bids, or Proposals and
Makes Recommendations to the Board when Required

Purchase Requisition is Cloned and/or Purchase Orders Generated
Prepared from Quotations, Bid Contracts, or Proposals

Purchase Orders are Printed & Distributed

Purchasing (or Whoever) Administers the Contract – Receives Goods/Services

Finance Processes Payment to Vendor

REQUISITION/PURCHASE

PROCESSING AN ORDER – ON-LINE SYSTEM

The Purchasing Department's turn-a-round time for getting a purchase order completed is one day (48 hours) if all necessary information relating to that order is entered correctly in the on-line system and all supporting documents are provided. Schools and departments will be able to access their PO information on-line as soon as the Purchasing Department has generated the Purchase Order.

Schools/Departments initiate their orders in the requisition on-line system. The requisitions are sent to Finance for account string verification and forwarded to Purchasing for cloning into a purchase order. All cloned purchase orders are batch processed each evening by MIS and printed and distributed the following morning by the Purchasing Department.

Buyers are responsible for coding requisitions. Coding consists of entering the buyer's initials and, where appropriate, the vendor's bid numbers on the face of the requisition listing which is printed daily. The buyers will verify that the source used (Vendor) is financially in the best interest of the district. If the item can be purchased at a lower cost from another source, the buyer has the authority to change the vendor. The buyer will notify the schools and departments if a change has been made to their requisitions. Buyers will also encourage schools and departments to utilize the district's purchasing card where appropriate to do so to eliminate costly processing of paper purchase orders.

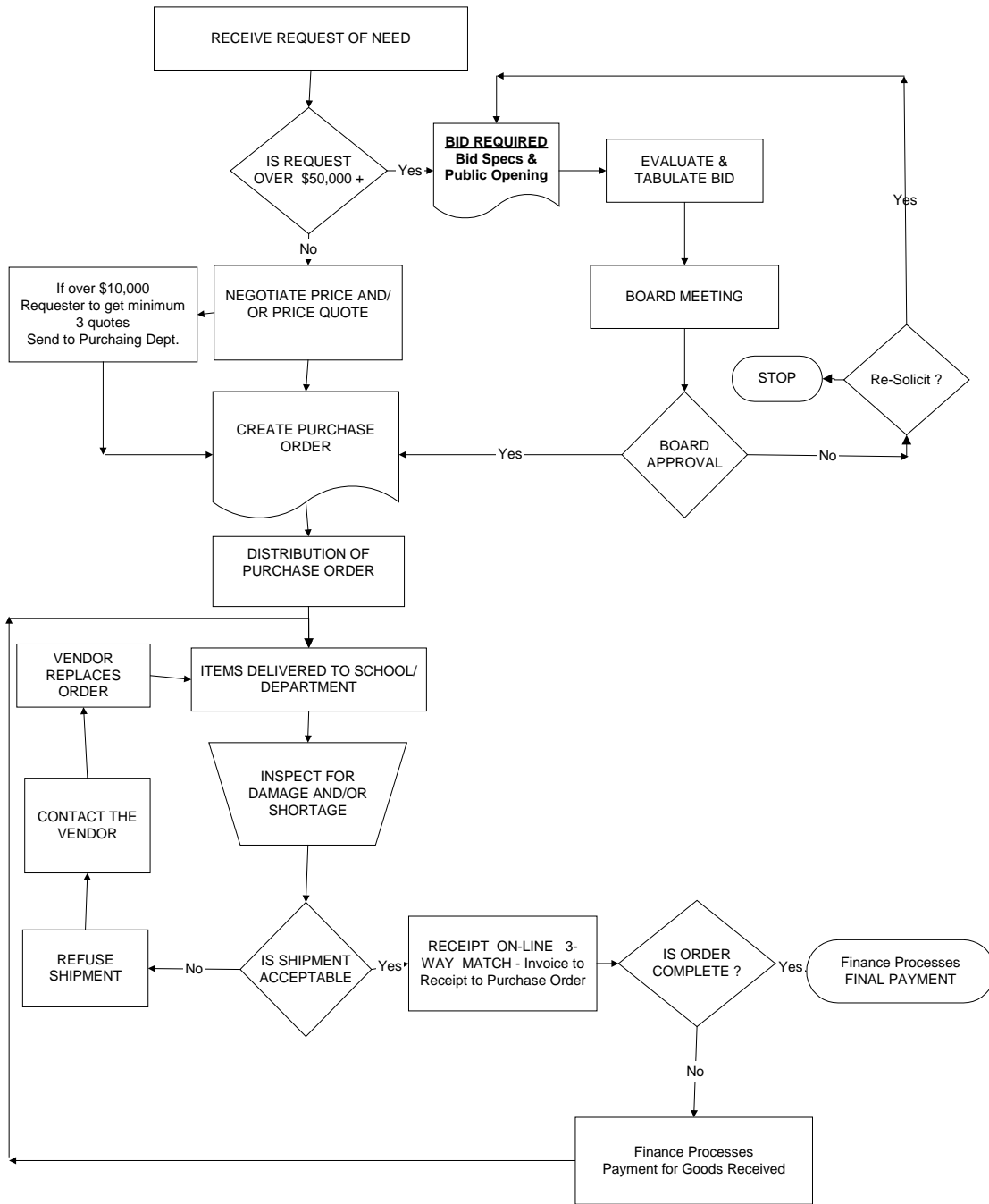
After coding, the requisitions are given to the Purchasing office staff for cloning into purchase orders. Cloning consists of duplicating the requisition into a purchase order using the on-line Purchase Order System.

If a purchase requisition requires an attachment, it needs to be entered into the system as a "NO MAIL" by the requisitioner. After it is cloned into a purchase order, it will be returned to the school/department who originated the order, so the attachment can be included with the PO when mailed to vendor by the school/department.

The purchasing department will monitor requisitions that have been entered by the schools and departments. If a requisition is left in an "incomplete" status, the originator of the requisition will be contacted by the purchasing department to either complete the requisition, or request that it be deleted from the system. All requisitions must be in a status of "NEW:PApprv" in order for it to be forwarded to Finance for approval.

For "How To" Instructions on preparing requisitions reference the Purchasing & Warehouse On-Line System Training Manual distributed by the Purchasing Department. If you have an employee who needs to be trained in how to enter requisitions contact the Purchasing Department at Ext. 20575

REQUISITION/PURCHASE



UPDATED: February 2009

REQUISITION/PURCHASE

PURCHASE ORDER CHANGE REQUESTS

Vendor Related Changes:

In most cases, vendors will contact the originator of the purchase order with any changes that are needed to a purchase order. These changes may be related to price increases, cancellation of item(s), quantity changes or changes in the vendor's address. It is the responsibility of the school/department to request these purchase order changes from the Purchasing Department in writing via email to the global Purchasing Department box. The Purchasing Department will make the necessary changes and print a revised (Change Order) PO. The change-order will be distributed to the requester unless they ask us to mail the change order PO directly to the vendor.

School or Department Generated Changes:

A school or department may need to have account string changed, items added or deleted, errors corrected, or to cancel a line or an entire purchase order. Email the office specialist on the purchasing departments website to handle these requests.

**Finance will handle any changes related to an account string.
Purchasing will handle all other requests for PO changes.**

When corrections have been entered to change or alter a purchase order, a sequential change order will automatically be generated for that purchase order in the on-line system. The change order will be printed and distributed by the Purchasing Department.

WAREHOUSE - CATALOG AND SUPPLIES

Our warehouse facility is located at **1301 Shapiro Drive, DeLand Industrial Park, DeLand, Florida 32724**. Phone: **(386) 947-8786**. The facility consists of 22,680 square feet of warehouse space. Freezer and coolroom space occupies 8,800 square feet. There are many items stocked in the warehouse for school and department ordering. Over three hundred (300+) items are currently being stocked for School Way Café.

The Purchasing Department is responsible for maintaining the warehouse catalog. You can access the warehouse catalog through the Purchasing Department's Website at www.volusia.k12.fl.us/purchasing; or by accessing the district's on-line requisitioning system. The catalog consists of the item number, unit of measure, description and cost. Warehouse stock items are listed in the following categories:

| | |
|-----------------------------|--------------------|
| Art Supplies | Paper Goods |
| Classroom & Office Supplies | Physical Education |
| Custodial Supplies | School Records |
| First Aid Supplies | Technology |
| Xerographic (Copy) Paper | |

Warehouse stocked items are purchased directly from bid or price quotes and are ordered on purchase orders originated in the purchasing department for non-food items and in School Way Café for food orders.

The Warehouse Buyer is responsible for all non-food items stocked in the warehouse. The stock status is reviewed weekly, or more often when warranted, to ensure that a sufficient stock level is available at all times

Warehouse Shopping Cart A Shopping Cart has been added to the On-Line Warehouse Catalog system. The Shopping Cart allows staff to complete an order request for warehouse products on-line, and then submit the request directly to the Requestor (Bookkeeper) for their site. The Requestor can then review the order request from the Shopper and then change, reject or process the shopping cart order into a warehouse requisition for delivery to the school or department.

The Warehouse Shopping Cart is located on the Purchasing Department's website, www.volusia.k12.fl.us/purchasing, under the 'Warehouse' tab. Use your district log-on information to access this site. The use friendly instructions for the "Shopper" and the "Requestor" can be found on the site by clicking the **Help?** button.

Warehouse Return Policy Schools and departments can return items purchased from the warehouse up to four weeks (20 working days) from date of delivery. Return of item(s) purchased must occur during the same fiscal year. Exception: Items delivered during summer break or intercession can be returned up to two weeks after staff returns. Items that are damaged, defective, or were ordered in error should be packaged carefully and returned to the warehouse for credit. A copy of the picking ticket, with the returned items highlighted, must accompany the returned item(s).

WAREHOUSE - CATALOG AND SUPPLIES

Back Order Requisition Report The Back Order Requisition Report is a weekly report listing warehouse items that are back ordered. Schools and departments can be contacted to make quantity changes on inactive and/or back ordered items.

SmartStream - Warehouse Catalog The warehouse catalog can be accessed through Volusia County School's on-line Geac SmartStream requisitioning system for inputting warehouse items into a requisition. You may also view items stocked in the warehouse by using the purchasing department's website at www.volusia.k12.fl.us/purchasing, under the 'Warehouse' tab. One advantage in reviewing the on-line catalog is that delivered cost is available for each item listed. The pricing information can be used as a tool to compare pricing to assure that you are getting the most value for your budget dollars. The catalog can be viewed by Item Number, Description and Category. The catalog provides the warehouse number, description, unit of measure, cost and the manufacturer for each item shown. The picture associated with each item provides the customer an example of that item. The brand and model you receive may be different than that shown in the picture, due to product rotation and purchases, but you will receive an equivalent product.

SAFETY DATA SHEETS (SDS)

All originators of requisitions and/or purchase orders for the purchase of chemicals, or items that contain chemicals, are responsible for requesting a Safety Data Sheet (SDS), from the vendor for all products containing chemicals which will be delivered to any district facility. **A statement requesting the SDS form be shipped with the product(s) being bought can be printed on the purchase order as either a line comment or a requisition/purchase order comment.**

The safety/security department will maintain a **complete file** of Safety Data Sheets (SDS) for listed substances used within the school system. Schools/departments should request a Safety Data Sheet (SDS) from the safety/security department in writing, via county truck, and/or by email, for each chemical being used/stored at their location. Each school/department shall also maintain a file of Safety Data Sheets (SDS) of chemicals being used/stored at their facility.

Bids released by the purchasing department for products containing chemicals will include a statement requesting a sufficient number of copies of the Safety Data Sheet(s) (SDS) from the awarded vendor(s). The purchasing department will forward the forms to the safety/security department who will be responsible for issuing them to the schools/departments using the products.

DIPLOMAS

The Purchasing Department will secure current pricing information from the vendors in December for the diplomas needed in May. (Currently, there are two (2) vendors who handle the printing of diplomas - Herff-Jones and Jostens. Each school may select the vendor they prefer.) The Purchasing Department will then distribute the diploma-ordering information memo to all high school principals, principals of ESE and alternative education sites, and diploma contacts at the high schools.

The Diploma Ordering Memo shall consist of the following information:

- 1) Vendor's name, address, and the representative's contact information.
- 2) Diploma pricing for each vendor.
- 3) Description of diploma choices:
 - a) Regular diploma, printed or blank
 - b) Special diploma, printed or blank (the word 'special' will not be printed)
 - c) Certificate of completion, printed or blank
 - d) Special Certificate of completion, printed or blank
- 4) School's responsibilities for submitting required information:
 - a) Send the "Current Principal's Signature Form" (if there has been a change from prior year) to their chosen vendor.
 - b) Creating and maintaining the "Graduation Name Panel Z505" provided by Technology Services & Innovation for the purpose of graduation seating charts and producing vendor list for ordering diplomas.

PURCHASING DEPARTMENT'S RESPONSIBILITY:

- 1) **Month of December**, request the signature forms, for the Superintendent and Chairman of the Board, from the Diploma Company Representatives. Forward the signature forms to the Superintendent's Secretary for completion. Forward the completed signature forms to the diploma companies. Each school will submit their own signature form for their current Principal.
- 2) **Month of December**, email each High School Principal requesting the **Name**, **Email Address**, and **Phone Extension** of their schools Diploma Contact person. Create an excel spreadsheet for the "DIPLOMA CONTACTS" information of each High School. This contact information will be forwarded to the Diploma Company Representatives once completed.
- 3) **Month of December**, send the diploma companies a copy of last year's "Diploma Memo" for review of any needed updates or corrections.
- 4) **First week of January**, send copy of revised/updated "Diploma Memo" to the Department Coordinators/Supervisors of Technology Services and ESE-Student Services (see last years memo for the diploma review group to "cc"). Ask for corrections or deletions of names to be copied on the memo. After approval, send the diploma memo out to the appropriate schools.

DIPLOMAS



DATE: January 10, 2017
TO: High School Principals and Diploma Contacts
FROM: Antoinette Shaffer, Purchasing Department
RE: **DIPLOMA ORDERING INFORMATION – GRADUATION 2017**

Following is the ordering information for diplomas. Schools may select the vendor of their choice.

| VENDOR | PRICES | VENDOR | PRICES |
|--|---|--|---|
| HERFF JONES (VENDOR: HERFFJONES 002) Rhonda Wilson Phone: 800-635-5670 x3839 Fax: 317-612-3839 Email: rmwilson@herffjones.com | <u>Diplomas</u> (See Rep. for price) <u>'State' Seals</u> \$0.25/ca. | JOSTENS (VENDOR: JOSTENS 006) Krystal Clemens, Rep. Phone: 800-413-3857 X 59265 Email: krystal.clemens@jostens.com | <u>Diplomas</u> (See Rep. for price) <u>'State' Seals</u> \$0.35/ea. |

| DESCRIPTION OF DIPLOMAS (Printed or Blank) | |
|---|-----------------------------------|
| Regular Diploma | Certificate of Completion |
| Special Diploma | Special Certificate of Completion |

Scholar and Merit Designation Seals:

The diploma designation seals required by the State (Merit and Scholar) should also be ordered at this time. Scholar and Merit designation seals are available through Herff Jones and Jostens for the new designations set forth by the State. It is recommended that you order additional seals to ensure that all students receiving this designation receive a seal. Note: These seals are to be placed ABOVE any district/honors seals added to the diploma.

Since high schools are able to place their orders directly with the company, you will no longer need to send any information to the Purchasing Department. Please see ordering directions below for the company of your choice.

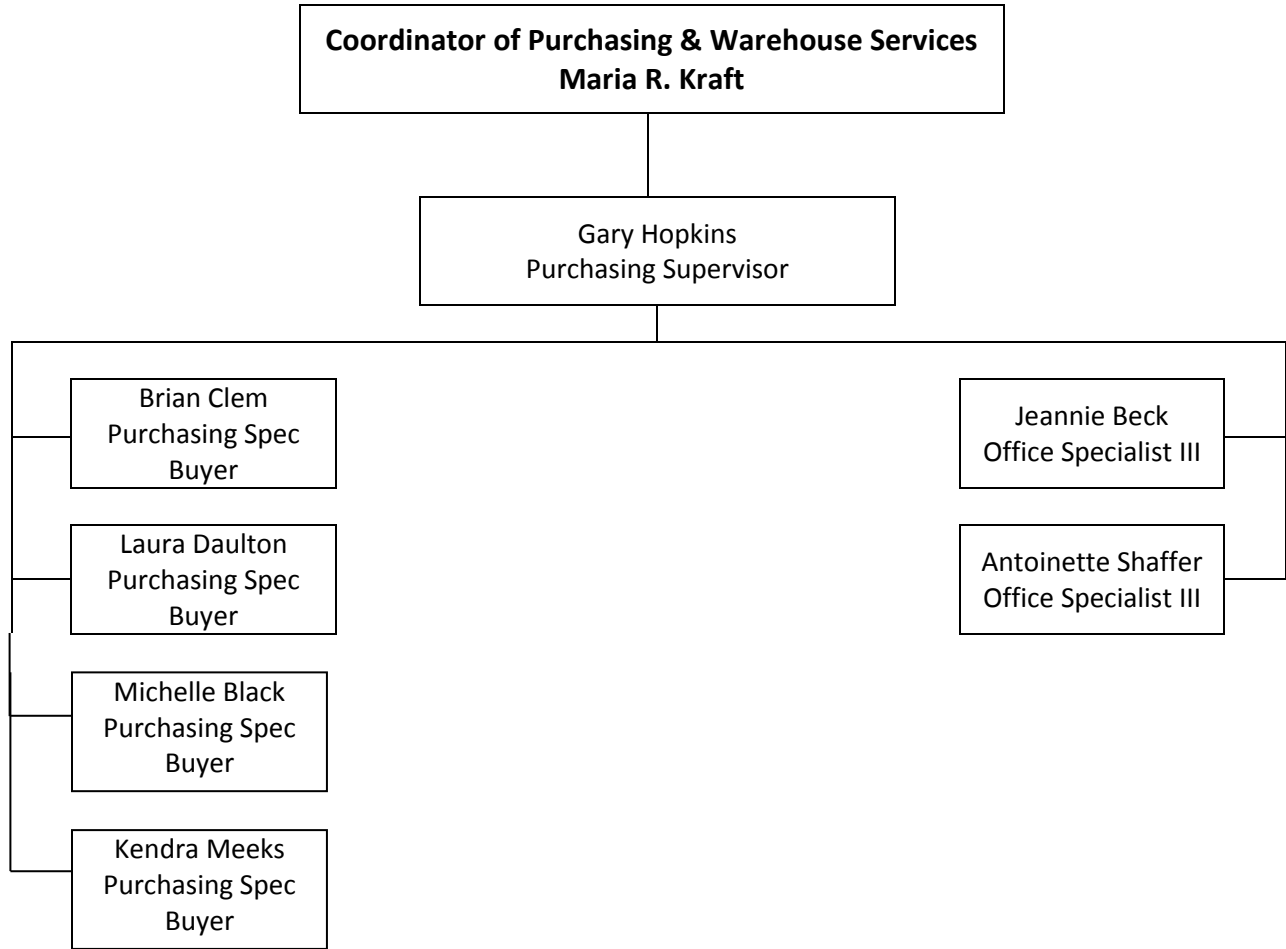
Herff Jones:

If you are ordering from Herff Jones, you can now place your orders directly, by emailing the complete order information to your Herff Jones representative, Rhonda Wilson, at the diploma division **prior to March 3, 2017**. The email address is provided above. Orders should include the student diploma list, basic order form (provided in your graduation packet) and the internal school Purchase Order. If you have not received the diploma order forms, please contact Rhonda Wilson and she can send it to you via email. You may attach the graduation listing from CrossPointe; please refer to instructions from Jennifer Hoag. If you will be paying the invoice(s) with your school P-Card, please indicate that when submitting your order.

Jostens:

If you are ordering from Jostens, you can place your order online directly with the company **prior to March 3, 2017**, by logging onto their website at <https://graduationcentral.jostens.com/custportal/signin.mvc> to access your existing account from the previous year (Member ID: School email address), or to <https://graduationcentral.jostens.com> to create a new account. If you need assistance with this process, please contact the Jostens representative, Krystal Clemens, at the email address provided above. You will be responsible for providing your student diploma lists and method of payment to the company. You may attach the graduation listing from CrossPointe; please refer to instructions from Jennifer Hoag. Mini diplomas (wallet size) and diploma covers may also be ordered. Please contact Paul Pope at (407) 894-3131 or by email at paulpope@jostens.com for pricing for your school. Jostens accepts internal school Purchase Orders or school P-card for payment. If you are paying with your school P-card, please contact their Accounts Receivable Department at 1-800-854-7464, ext. 17159. You will be able to provide your credit card information directly to them.

**THE SCHOOL DISTRICT OF VOLUSIA COUNTY
DIVISION OF ADMINISTRATIVE SERVICES
PURCHASING DEPARTMENT
AUGUST 2016**



Total Employees: 8
As of January 2017

PURCHASING PERSONNEL GUIDELINES

This section is intended to give basic information on how the department operates on a daily basis.

The Personnel Office conducts new employee orientation and distributes a handbook with the policies of the school board. Please reference this handbook if you have questions on items such as how sick and vacation time accrues, etc.

ATTENDANCE

Each position in the Purchasing Department is essential to keeping the department running smoothly and efficiently. It is expected that you report to work on time and keep your absences to a minimum. Excessive tardiness and absences cause a hardship on your co-workers who must fill-in when you are not here.

Vacation Leave - Requests for vacation are to be approved by your immediate supervisor prior to making arrangements for the leave (Hotel, Airline Tickets, etc.). If a conflict occurs, workload coverage and previously approved leave requests must be considered in order to approve your request for vacation days.

Sick Leave - Please contact your immediate supervisor prior to your scheduled start time if you are not going to be able to come to work. Arrangements need to be made to assure coverage for your position during the time you will be out.

Overtime - Overtime must be approved by the Coordinator of Purchasing or the Purchasing Supervisor prior to being worked. No compensation will be earned without prior approval. Overtime will be approved when there is a legitimate need based on the current workload situation.

Comp Time - At the discretion of the supervisor, or by employee request, compensatory time can be given in lieu of monetary compensation for overtime worked. The comp time is to be taken within the pay period in which it is earned whenever possible. Comp time is to be scheduled in advance with your supervisor prior to taking the time off.

Lunch Hours - Lunch hours are to be taken at your regularly scheduled time. The lunch hour is not intended to be used as comp time to forego working the last hour scheduled for the day, or to supplement a mid-day appointment. If an employee does not have accumulated leave time, and a need arises to be absent, the time will be granted and taken as unpaid sick or unpaid personal leave.

CLERICAL SUPPORT STAFF

VESA employees who work as full time employees - 8 hrs/day are entitled to two paid 10 minute breaks during the workday. Break times and lunch periods will be scheduled by the supervisor in order to ensure office coverage for the entire day.

PURCHASING PERSONNEL GUIDELINES

CLERICAL SUPPORT STAFF: (continued)

LEAVE REQUESTS

All leave requests are to be approved by your immediate supervisor prior to making any travel plans or other arrangements. Leave requests will be approved on a first come, first granted basis. The current workload status will be the basis in granting leave approvals. When a full-time clerical employee requests leave for an entire day; whether it is vacation, sick or comp time, the employee is assessed eight (8) hours for the day they will be out of the office. The minimum amount of time that can be taken is one hour, with 15 minute increments thereafter.

TIME CLOCK

Employees are to check in and out for each day they work using the Department's Time Clock Plus System. Hourly paid employees who work over 40 hours a week must be paid for the excess hours at the rate of one and one-half time, or compensatory time must be given at the rate of one and one-half time.

Employees who are under the Wage & Labor Laws may not take work home with them nor may they volunteer to work additional time.

HOUSEKEEPING

We have a responsibility to keep our individual work areas clean and orderly. If we all do our part to keep the office areas clean and neat, we can be proud of the way our offices look to others, including vendors, who visit our department.

PURCHASING PERSONNEL GUIDELINES

WORKER'S COMPENSATION CLAIMS

What to Do In Case Of a Work Related Injury or Illness

The following procedures are to be followed if an injury occurs during working hours.

1. **Reporting an Injury or Illness**

It is the responsibility of every employee to report a work-related injury/illness **as soon as it happens**. The employee must notify his/her supervisor and the work-site benefit contact person (Coordinator of Purchasing Secretary) immediately and complete a *Comprehensive Accident Report*. The benefit contact person will complete the *First Report of Injury/Illness Form* and will offer medical attention, if needed, with an approved worker's compensation medical management treatment facility. An *Employee Acknowledgement Form* must be reviewed and signed by the employee and a *Medical Authorization for Treatment Form* will be completed by the benefit contact person. The employee must seek medical attention within 24-Hours of the authorization and must present the authorization form to the medical facility for treatment.

2. **Obtaining Medical Attention**

When an employee requires medical treatment for a work related injury/illness, the benefit contact person will complete the *Medical Authorization for Treatment Form* authorizing the employee to be treated and evaluated by our authorized providers for initial medical care. In order for the employee to receive the medical benefits at no cost to them, treatment for the work-related injury/illness must be sought from an authorized facility or provider. The authorized treating physician will evaluate and treat the employee and will give him/her a **Return to Work Status Report** which must be returned to the benefit contact person and/or supervisor (valid on date of service). If follow-up appointments are required, they should be scheduled during non-working hours. If they are scheduled during working hours (when an employee has been released to work by the approved physician) the employee must use their personal sick leave for those appointments.

3. **Referral to a Specialist**

Services of a specialist require a request from an authorized physician, approved and scheduled by the third party administrator hired by the district.

4. **Prescriptions**

Prescription drugs may be obtained at a participating pharmacy at no cost to the employee. A listing of approved pharmacies is available from the district's Medical Management Program Coordinator.

If you have any questions regarding the services provided by the district please see the secretary to the Coordinator of Purchasing.

SAFETY IS EVERYONE'S RESPONSIBILITY!

FILING SYSTEMS AND RECORD RETENTION

Well-organized purchasing records not only promote efficient systems, they also help to set a standard for success. A systematic filing system makes it possible to locate records quickly and efficiently. Some of the records to be maintained in the Purchasing Department are bids, contracts, and vendor data files. Paper copies of purchase orders are no longer kept by Purchasing Department; they are on-line and can be printed when necessary.

It is imperative that the purchasing staff have ready access to information regarding these records so they can respond quickly to the requests made by schools/departments, vendors and the public.

Bid Folders

Bid folders are filed numerically by bid number. They are maintained in the purchasing department as long as they are active, after which they are sent to Archives and Record Management Services for retention per state statutes.

RECORD RETENTION

The School District of Volusia County, Archives and Records Management Services Department publishes a **Records Disposal Guide** which outlines the policies for record retention, preservation and disposal of documents. This document can be referenced to determine the required length of time to keep specific types of records such as bids and purchase orders. The information is available at www.volusia.k12.fl.us click on Departments, then select Archives and Records.

PURCHASING RESPONSIBILITIES

PURCHASING'S MAIN OBJECTIVE IS TO KEEP THE SCHOOL SYSTEM OPERATING BY TIMELY, COST EFFECTIVE PROCUREMENT OF MATERIALS AND SUPPLIES. WE FUNCTION AS A SUPPORT AND SERVICE AGENCY TO SCHOOLS AND OTHER ADMINISTRATIVE DEPARTMENTS.

Working together in a spirit of cooperation will ensure that purchase orders, competitive solicitations and construction projects are processed in a timely and efficient manner. ***The key is open communications and courteous responses to each other's requests for help and/or information in order to accomplish the goals of the department.***

RESPONSIBILITIES OF THE PURCHASING DEPARTMENT

1. To know and become acquainted with the requirements of schools and departments within the school district.
2. To procure products and/or services that will meet or exceed the schools and department's needs at the lowest possible cost to the district.
3. To respond to schools/departments in a professional and timely manner to requests for purchasing assistance.
4. To provide purchasing assistance for new schools, renovations and additions with monies designated for equipping and furnishing new or renovated buildings. (See Capital Outlay Expenditures - Sections III-9 & 10.)
5. To provide essential materials and supplies needed to support and maintain schools that have been designated as "Emergency Shelters".
6. To prepare, tabulate and evaluate bid specifications to make recommendations to the Board for the procurement of equipment and services. Each buyer is responsible for answering any and all questions that may arise from discussions of their bid recommendations.
7. To order and maintain a perpetual inventory of materials, supplies, and equipment stored at the Central Warehouse Facility.
8. There is a "Shopping Cart" available on-line for teachers and staff to use to select their items and then forward it to their budget clerk for approval and purchase.
9. To review and process (clone into purchase orders) within 24 hours all approved purchase requisitions on a daily basis. Exceptions will be requisitions that are incomplete, need clarification from the originator, or which are awaiting approval from Finance.
10. To distribute within 24 hours purchase orders that were printed from cloned requisitions the previous day.
11. To work with suppliers and vendors in a professional manner to facilitate purchases and to stay current on what is available in the market place.

PURCHASING RESPONSIBILITIES

12. To manage the daily operations of the District's Purchasing Card Program by functioning as the Card Program Administrator and serve as the financial institution's liaison to the district. The department will work closely with Finance to develop and maintain the Purchasing Card User's Manual outlining the benefits and responsibilities of the program to all cardholders and staff.
13. In addition to other duties conferred by policy or administrative rules, the buyers shall:
 - a. **Minimum Expenditure** Act to procure for the school board the highest quality supplies and contractual services at the lowest possible cost.
 - b. **Encourage Competition** Encourage all vendors to participate in the bid process and endeavor to provide as full and open competition as possible for all purchases and sales.
 - c. **Rules and Regulations** Establish and abide by all rules and regulations authorized by Policy 702 and this manual and any other District policy necessary to assure compliance to all rules and regulations set by the State and the School Board.
 - d. **Purchasing Analysis** Keep informed of current developments in the field of purchasing, pricing, market conditions and new products available. To secure for the School District the benefits of research conducted in the field of purchasing by other governmental jurisdictions, national technical societies, trade associations having national recognition, and by private businesses or organizations.
 - e. **Purchasing Manual** Participate in the development and maintenance of a standard purchasing manual, which will be available for schools/departments throughout the district.
 - f. **Forms** Create and maintain such forms as are reasonably necessary to the operation of the Department. If an MIS number is required on the new form, whoever develops the form will arrange to secure the MIS number.
 - g. **Bulk Purchases** Explore the possibilities of buying "in bulk" so as to take full advantage of price discounts. Staggered deliveries may also be available.
 - i. **Tax Exemptions** Act to procure for the School Board all tax exemptions to which it is entitled.
 - j. **Cooperation** Cooperate with using agencies so as to secure for the School Board the maximum efficiency in budgeting and accounting.
 - k. **Disqualification of Bidders** Have the authority to declare vendors who default on their bid submittals and quotations as "irresponsible bidders" and disqualify them from doing business with the School Board for a stated period of time. Documentation of this action must be done in writing with the approval of the Purchasing Coordinator and/or Purchasing Supervisor.

Michelle Black

Phone 386-947-8786 Ext 50863
Food, P-Cards, Furniture (alternate)

Commodity Description

Appliances, Large/Small (Household Type)
Armored Car Services, Money Pick-Up
Financial Services, Purchasing Cards
Food - Beverages
Food- Bakery Products
Food- Beverages, Coffee Products, Supplies/Equipment
Food- Snack Products
Food-Beverages, Fountain
Food-Cafeteria Paper Products
Food-Dairy Products (Milk, Cottage Cheese)
Food-Food Products
Food-Fresh Produce
Food-Frozen Specialties
Food-Kitchen Equipment, Deterg/Cleaning Supplies
Food-Kitchen Equipment, Large, Serving Lines
Food-Kitchen Equipment, Smallwares
Food-Vending Machine Services
Ice Machines, Parts/Accessories

Kendra Meeks*Phone 386-947-8786 Ext 50761*

Uniforms, school supplies, furniture, ESE, ERP

Commodity Description

Agriculture Equipment & Supplies
 Art Equipment & Supplies
 Awards & Recognition Items
 Bar Code Equipment
 Books, General
 Child Care, Accessories & Equipment
 Clinic Equipment, Supplies & Kits
 Drafting Equipment & Supplies
 Drivers Education, Equipment & Supplies
 Furniture, Administration/Office
 Furniture, Cafeteria Tables & Booths
 Furniture, Classroom
 Furniture, Storage/File Cabinets, All Types
 Graphic Arts Equipment & Supplies
 Health Care Equipment & Supplies-Special Needs
 Health Care Services, Professional
 Home Ec, Equipment & Supplies
 Horticulture Equipment & Supplies
 Laminating Presses & Supplies
 Language Labs, All Types
 Library Supplies
 Maps, Globes, Charts
 Music Systems
 Musical Instruments, Repair
 Musical Instruments, Supplies & Accessories
 Periodicals, Magazine, Newspaper Subscriptions
 Photo/Darkroom Equipment Supplies & Service
 Physical Ed. & Fitness Equipment
 Pianos, Keyboards & Service
 Science Equipment & Supplies
 Speech/Hearing Equipment & Supplies
 Sporting & Athletic Events, Prof. Services
 Sporting & Athletic Scoreboards (Sports)
 Summer School Supplies
 Teaching Aids
 Testing Materials & Equipment, Student
 Therapy Services
 Uniforms, Band, ROTC & Accessories
 Uniforms, Employee, Purchased
 Uniforms, Employee, Rental

Brian Clem*Phone 386-947-8786 Ext 50853*

Construction, Facilities, Transportation, Contracting Services

Commodity Description

Advertising, Newspaper, Publications
Air Conditioning Equipment & Supplies
Athletic Field Maintenance
Automobile, Batteries, All Types
Automobile, Engines, All, Purchased
Automobile, Purchase/Lease/Rentals
Automotive, Engines, Rebuilt, All Types
Automotive, Glass, All Types
Automotive, Lifts & Ramps, Tailgates, Powered
Automotive, Oiles & Fluids
Automotive, Painting, Body Repairs & Supplies
Automotive, Parts & Supplies, All Types
Automotive, Tires, All Types, Service & Equipment
Automotive, Upholstery Services & Supplies
Automotive, Vehile Towing Services
Automotive, Washing Equipment & Parts Cleaner
Awnings, All Types
Batteries, Gen. Purpose, Rechargeable, Not Auto
Bleacher Repair
Bleachers, Granstands
Buildings
Cafeteria Hood Cleaning
Carpentry & Building Supplies
Carpet, Flooring Installation & Supplies
Communication Systems, Integrated
Construction Services (Backup Laura Daulton)
Custodial Equipment & Supplies
Custodial Services/Management
Dirt, Rock, Sand & Shell
Electrical Equipment & Supplies
Elevators, Parts Maintenance, Installation
Fencing Materials & Installation

Fertilizers & Pesticides
Fire Alarms, Equipment & Services
Fire Extinguishers & Maintenance
Fire Sprinkler/Hydrant Systems Main/Repair/Insp
Flags, Poles & Accessories
Fuel, Diesel/Gasoline
Fuel, Gas, LP, Propane
Generators, Service & Supplies
Golf Carts, Supplies & Service
Grounds Maintenance & Supplies
Hardware, General Supplies
HVAC Water Treatment Services
Lamps, Bulbs, Fluorescent Lights
Lawn Equipment & Supplies
Lifts, Hoists, Buckets, Hydraulic, All Types
Locks, Parts & Service
Lumber, Plywood, Panerling, etc.
Materials Handling Equipment, Maint/Service/Supplies
Mats, Entrance, All Types
Paint & Paint Supplies
Painting Services
Park Equipment & Supplies
Pest Control Services
Plumbing Supplies
Playground Equipment
Radios, 2-way, Por/Mobile/Stationary, Maint & Parts
Rentals, All- EXCEPT Vehicles & Uniforms
Roofing Maintenance, Repair & Installation
Safety Devices & Equipment
Security Services, Contracts & Devices
Theatre Curtains, Drops
Tie-Downs
Tools, Hand/Power, & Supplies
Trailers, All Types
Trash Removal, Sludge Collection
Water & Wastewater Maintenance
Window Covering, Curtains, Drapes, Blinds

Laura Daulton

Phone 386-947-8786 Ext 50841

Technology, Consulting, Insurance, Surplus, Financial Services, Warehouse

Commodity Description

Auctioneering Services

AV Equipment

Calculators

Computer, PC Repair & Maintenance

Computer, Peripherals, Accessories & Supplies

Computer, Printers, All Types

Computer, Software

Consultant Services, Financial

Consultant Services, General

Employment Services, Temporary

General Contracting Services (back-up)

Identification Systems/Supplies, Photo

Insurance, General

Sale of Surplus Items-Computer Equipment

Sale of Surplus Items-Kitchen Equipment

Sale of Surplus Items-Misc.

Sale of Surplus Items-Vehicle, Except Buses

Sale of Surplus Items-Yard Equipment

Video Equipment

Gary Hopkins

Phone 386-947-8786 Ext 50845

Construction, Facilities, Transportation, Contracting Services

Commodity Description

Classroom Supplies (Warehouse)
Classroom Supplies General
Copier Equipment, Service & Supplies
Moving & Storage Service
Office Equipment & Accessories
Office Equipment Maintenance & Repairs
Office Supplies, General (Not Machines)
Paper, Classroom & Office
Postage, Shipping, Meters, PO Box Rentals
Printing, All Types
Toner, Printers, Supplies

Commodity Description

Vendor Registration/Vendor Guide

Vendors are requested to go on Vendor Link and register in order to receive notifications when a competitive solicitation is released by the school district. The Vendor Information Guide is also available on our website. The Vendor Information Guide provides detailed information on how to do business with the school district. In the event a bid is in process and time does not allow a vendor to complete their vendor application in order to participate in the bid process, a letter, email or fax from the vendor can be used to add their company to the bidder's list. This document will be placed in the active bid folder with the Vendor Mailing List. Vendors may also access bid information on our website and submit their offer by the due date and time if they wish to be considered at the public bid opening. Late bids will not be considered, so you must get the bid in on time to participate in the process.

It is the responsibility of the vendor to keep all of their information up-to-date in order to receive bid notifications from the school district.

CATEGORY CLASSES FOR BIDS AND RFP'S

- C: Construction Materials, Carpet, etc.
- CL: Classroom Supplies, Paper, Science Equipment, etc.
- CPT: Computer Equipment & Supplies
- E: Equipment – Audio Video, Video, Copiers, etc.
- F: Furniture – Classroom, File Cabinets, Lockers, etc.
- FIN: Finance – Banking Services, Audit Services, Investment Services, etc.
- INS: Risk Management – Vehicle, Property, Health, Liability, etc.
- MTS: Maintenance – Custodial Services, Maintenance Equipment & Supplies, etc.
- P: Printing, Printed Forms, Booklets, etc.
- PL: Playground Equipment & Supplies, First Aid Supplies, etc.
- S: Services – Occupational & Physical Therapy, Wastewater, etc.
- SWC: School Way Café – Food, Equipment, Paper Goods, etc.
- TR: Transportation – Equipment, Supplies, Vehicles, Fuel, Oil, etc.

VENDOR INFORMATION GUIDE

FORWARD

The purpose of this guide is to explain the purchasing process by which the Volusia County School Board acquires necessary goods and services to efficiently operate the School District. If you have any questions not answered in this guide, please call the **Purchasing Department at 386-255-6475 (Daytona); 386-734-7190 (DeLand); or 386-427-5223 (New Smyrna Beach). The department, at extension 50855, can be reached from any of the listed phone numbers.**

It is the intent of the School Board to procure equipment and services at the lowest possible cost, consistent with the quality standards necessary to meet the requirements of the district. Our goal is to ensure that every purchase made is done fairly and that all responsible vendors have an equal opportunity to participate in the competitive process.

Volusia County School District currently operates and maintains 74 schools with enrollment exceeding 63,000 students. A partial listing of items purchased by the School Board is shown below.

- | | |
|---------------------------------------|-----------------------------------|
| * Appliances, Equipment & Repairs | * Insurance, All Types |
| * Audio Visual Equipment & Supplies | * Janitorial Equipment & Supplies |
| * Automotive Parts & Supplies | * Lawn Equipment & Maintenance |
| * Books & Publications | * Office Supplies |
| * Building Maintenance Supplies | * Paper, Classroom, Copier, Misc. |
| * Classroom Equipment & Supplies | * Pest Control Services |
| * Clinic Equipment & Supplies | * Playground & Athletic Equipment |
| * Communication Services | * Teaching Aids |
| * Computers, Equipment & Supplies | * Telecommunications Systems |
| * Copier Equipment & Services | * Testing Materials |
| * Fire Protection Equipment & Systems | * Uniforms |
| * Fleet Equipment & Supplies | |
| * Food Equipment & Supplies | |
| * Fuel, Diesel & Gasoline | |
| * Furniture, Schools, & Offices | |

PURCHASING POLICIES

The school district is governed by State Statutes, Administrative Rules, and Board Policies for the procurement of equipment, goods, and services. The following is a basic outline of the purchasing process for Volusia County Schools.

Dollar Limit

\$0 to \$9,999

Purchasing Method Used

Small Purchases – Goods and Services are purchased on the open market. The District's purchasing card is encouraged for all expenditures as outlined in the Purchasing Card Users Manual.

\$10,000 to \$19,999

Informal Quotes – Goods and services are purchased after securing a minimum of three (3) written quotes from selected vendors. A copy of the written quotes shall be forwarded to the Purchasing Department.

\$20,000 to \$49,999

Requests for Quotation RFQ - Originator requests a Formal Request for Quotation (RFQ) issued by the Purchasing Department. The Purchasing Department shall obtain written quotations from a minimum of three (3) selected vendors. Vendors participating in an RFQ process must submit their completed RFQ within the designated time period in order to be considered.

\$50,000 and up

Formal Sealed Competitive Solicitations - Any expenditure exceeding the maximum amount allowed by law requires a formal sealed competitive solicitation. Facilities and Construction and the Purchasing Department handle all sealed solicitations issued by the school district.

FACILITIES & CONSTRUCTION PROJECTS are handled by the Facilities & Construction Department.

BIDDER'S LIST

If you wish to receive notice of future bids, please register on Vendor Link which is located on our website at <http://myvolusiaschools.org/purchasing/Pages/Home.aspx> . A paper copy of bid documents can be obtained by contacting:

School District of Volusia County
 Purchasing Department
 3750 Olson Drive
 Daytona Beach, FL 32124
 Phone: 386-947-8786, extension 20586
 Fax: 386-506-5056

When completing Vendor Link, be sure to check the commodity codes for those items for which you would like to receive a bid notice. You will receive notification of bid solicitations through Vendor Link of any bids by the commodity codes you have registered for. It is the vendor's responsibility to keep their information current on their Vendor Link.

BID INFORMATION

Bid Advertisement: The Purchasing Department advertises all formal bids on Vendor Link.

Bid Response: Responding to an *Invitation to Bid* is important in order to remain on the active bid list. If the response has to be a "No Bid," complete the lower section labeled "No Bid" on the cover page and return the form in a sealed envelope marked "No Bid." Please provide your company's name and address on the outside of the response envelope.

Bid Forms: General and Special Conditions are contained in each competitive solicitation released. It is the vendor's responsibility to understand and comply with these conditions. Once you have completed the bid response sheets, check for any errors. Make sure that all necessary signatures, attachments (including any addenda), and bid response forms are submitted with your bid. Seal the bid in an envelope and return it to the address specified in the documents.

Be sure that your bid reaches the Purchasing Department prior to the time and date specified on the bid form. LATE BIDS WILL NOT BE CONSIDERED.

Bid Opening: All bids are opened in public at the designated date, time and place. Bidders and the public are invited to attend, but it is not required. The names of the responding bidders will be read aloud in the specified bid opening room. No activity on the part of the bidders at an opening, other than attendance or note taking, is permitted. Any attempt to qualify or change any bid by a bidder may result in the rejection of that respondent's bid.

Bid Tabulations – Posting: After the bid is evaluated, the bid tabulation showing results and recommendations for award(s) is posted on Vendor Link and the website "Bulletin Board" for a period of seventy-two (72) hours. Public inspection is invited. Responding vendors will be notified when the recommended tabulations are posted to the website. NOTE: These 'recommended' tabulations/ recommendations are NOT official until Board action is taken. After Board approval responding vendors will be notified by email that the tabulations can be reviewed. **All active bids and tabulations are available on our website listed under "Active Bids".**

Inspection of Bids: Bids and proposals shall be made available for public inspection on the posting date and/or ten (10) days after bid or proposal opening, whichever is earlier.

Bid Mistakes and/or Withdrawal: If a bidder makes a mistake in their bid, they may correct it and re-submit the sealed bid prior to the date and time of opening. After the opening, the prices bid must stand as submitted. All bids submitted must be firm for the minimum time stipulated in the bid document. A bidder will not be permitted to withdraw a bid without good cause after the designated time for the opening of bids. Good cause shall be defined as a clear error. An example of a clear error would be a price submitted as \$1.00 each, instead of \$100.00 each. If a bidder wishes to withdraw a bid, a written request to the Director of Purchasing stating the reason(s) for the desired bid withdrawal shall be submitted for consideration by the Board, or its designee, and shall be signed by a duly authorized agent for the bidder.

Bid Rejection/Cancellation: The School Board shall have the authority to reject any or all bids, and request new bids, according to State Board Rule: 6A-1.012(8). The Purchasing Department will recommend the rejection of any or all bids, when appropriate and in the best interest of the School Board. The Board will accept or reject the recommendation.

Award Policy: The School Board shall accept the lowest and best bids from responsive and responsible bidders who meet, or exceed, all specifications.

Bid Specifications: Specifications are detailed descriptions of the commodities and/or services to be purchased which establishes the minimum acceptable standards. If you have any questions, concerns, or objections regarding the specifications, contact the Buyer listed in the bid documents prior to bid opening.

Resolution of Bid Protests: The School Board has adopted the procedures specified in Purchasing Policy 702 and Florida Statutes, Section 120.57(3) to resolve any disputes regarding a competitive solicitation issued by the District.

PURCHASE ORDER INFORMATION

Purchase Orders: Vendors must receive a purchase order prior to providing goods and/or services to the school district. Invoices will not be processed for payment without a valid purchase order.

Taxes: The School Board is exempt from any taxes imposed by the state and/or federal government. A tax exemption certificate will be furnished upon request.

Deliveries: Delivery instructions are printed on each purchase order. The purchase order number should appear on the shipping or delivery ticket and on each package or container delivered to the location specified on the purchase order. Failure to meet the specified delivery date and schedule may result in the cancellation of the order and/or contract. Any goods that are received damaged, or do not meet specifications, will be returned at vendor's expense for full credit.

HOW TO RECEIVE PAYMENT

Vendor's Invoice: In order to receive payment for goods or services provided to the School Board, the vendor must submit an original invoice to the Finance Department. Properly prepared invoices are normally paid within 30 days after delivery and acceptance of goods/services. To prevent delays in payment, the vendor's invoice should contain the following:

1. Vendor's invoice number
2. Date of invoice
3. The Volusia County School Board's purchase order number
4. Quantity of each item
5. Itemized list and description of goods/services
6. Unit price of each item
7. Extended cost for each item
8. Delivery charges, if any
9. Discount terms

Purchasing Cards: Each school and department has been issued a *District Purchasing Card*, to be used for small, non-capital expenditures. Use of the purchasing card will expedite payment to vendors.

Vendor Information Updates: We encourage all vendors to contact our School Board Buyers to keep them informed of new products and services that become available. A list of buyers and their commodities can be found on the Purchasing Department website. We suggest you contact the individual Buyer who is handling your

commodity or service to make an appointment to meet and discuss your products and/or services and to answer any questions you may have. We can be reached at the following phone numbers:

PURCHASING DEPARTMENT – EXTENSION 50855

386-255-6475 Daytona Beach
386-734-7190 DeLand
386-427-5223 New Smyrna Beach

THANK YOU FOR YOUR INTEREST IN DOING BUSINESS WITH THE SCHOOL DISTRICT OF VOLUSIA COUNTY. WE LOOK FORWARD TO HEARING FROM YOU!

VISION STATEMENT

Ensuring all students receive a superior 21st century education.

BID & QUOTE PREPARATION

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BID and QUOTE REQUIREMENTS

COMPETITIVE BIDS

A formal bid is defined as a sealed bid, Request for Proposal (RFP), or other competitive solicitation with the title, date and hour of the public opening designated in the bid. It shall include printed instructions describing all general rules, regulations and special conditions for vendors to submit an offering to the school district for the item described in the documents. The Invitation Cover Sheet provides for a manual signature of an authorized representative that binds the bidder to honor their offer if accepted by the Board. Competitive solicitations (Formal Bids) are required for all purchases that ***exceed the maximum amount by law, currently \$50,000.00***, either cumulatively for like items, or for a single individual item. (Refer to rules and regulations of Department of Education Administrative Rule 6A-1.012, School Board Policy 702, and Chapter 287 Florida Statutes)

COMPETITIVE QUOTES – RFQ

Competitive Quotes are issued by the Purchasing Department for items costing between \$20,000 and \$49,999.99. The Buyer will define the terms, conditions, and specifications for the item or service being requested and will issue a call for quotes. Purchasing and the using department will determine the lowest and best acceptable offer. All RFQ's and the results will be posted on the district's purchasing website.

General Requirements – Dollar Limits (Policy 702)

Emergency Contracts

Definition: If it is determined in writing that an immediate danger to the public health, safety, welfare or other substantial loss to the district requires emergency action the department may proceed with the procurement of goods/contractual services necessitated by the immediate danger, without competition. However, such emergency procurement shall be made with such competition as is practicable under the circumstances.

Note: Written documentation from the department/school is required which will spell out the method used to secure the emergency items and show the actual amount of money expended. For items that exceed the bid threshold, the Purchasing Director will, as soon as practical, list the emergency expenditure as an agenda item and send to the Board for approval. (Reference: Purchasing Policy 702, Section IV (G))

General Requirements – Dollar Limits - Continued

DOLLAR LIMITS – Established by the Board

The School Board has defined in Policy 702, Section II (D) guidelines for acquiring commodities and contractual services at the following dollar limits. These dollar limits determine what method will be used to procure goods and services – informal quotes, RFQ, or formal competition such as ITB, RFP, ITN, or other types of solicitations (Reverse Auctions, etc.).

Small Purchases: (up to \$9,999.99)

Goods and services costing under \$9,999.99 are purchased on the open market with or without competition. Use of the district's purchasing card is encouraged for all minor amounts that are below the district's set dollar amount for fixed assets (\$1000.00). The Purchasing Department has the authority to change the selected vendor if it is in the district's best interest to do so.

Informal Quotes – (\$10,000.00 to \$19,999.99)

If the total dollar value of the goods or services required will cost between \$10,000.00 and \$19,999.99, the person requisitioning the items must provide the Purchasing Department with a minimum of three written quotes from qualified vendors. The Purchasing Department will approve the purchase, and may at its discretion, change the selected vendor if it can procure the item elsewhere at a cost savings to the district. The Purchasing Department has the authority to change the selected vendor if it is in the district's best interest to do so.

Request for Quotation (RFQ) (\$20,000.00 to \$49,999.99)

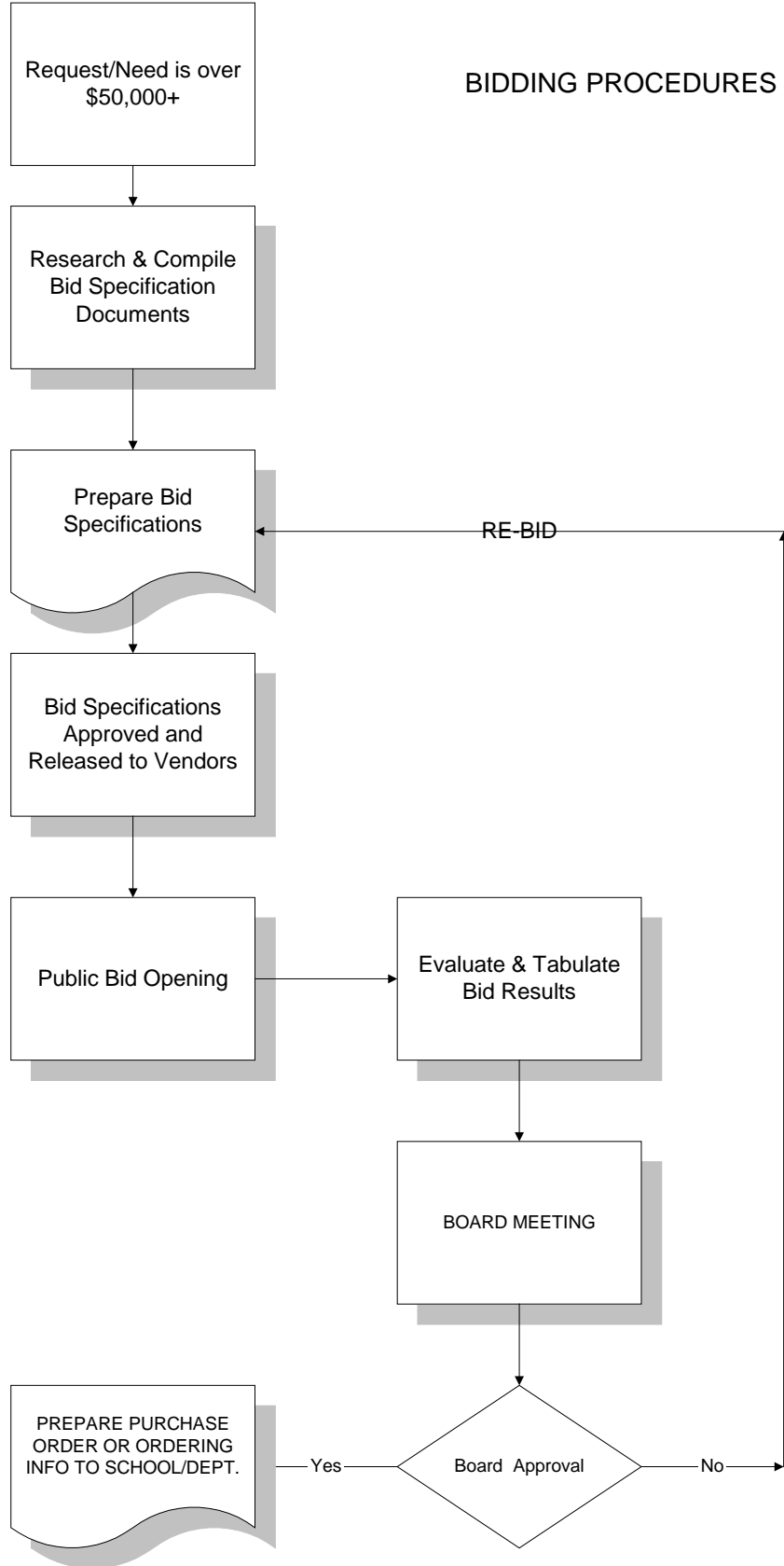
Goods and services costing between \$20,000.00 and \$49,999.99 are purchased after requesting a formal Request for Quotation (RFQ). The Purchasing Department shall obtain written competitive quotes from a minimum of three (3) selected vendors. Vendors who participate in the RFQ process must submit their completed RFQ within the designated time period in order to be considered for award. The Purchasing Department will review the responses and select the lowest and best responsive and responsible quotation.

Formal Sealed Competitive Solicitations (any amount over \$50,000.00)

Purchases for \$50,000.00 or more must be acquired through the use of a sealed competitive solicitation, with the exception of a sole (single) source vendor, emergency purchase, or other purchase which is expressly exempted from the competitive solicitation process by law. See Section V – Exceptions to Competitive Solicitations in Policy 702. Solicitation packages are prepared by the Purchasing Department outlining the terms, conditions and specifications for the item or service being requested. Responses must be returned to the Purchasing Department by the due date and time in order to be considered for award.

The following page illustrates the basic steps of competitive bidding process used by the Purchasing Department.

BIDDING PROCEDURES



TO DEVELOP NEW BID SPECIFICATIONS

Buyer will request a meeting with specialist, department heads and/or schools prior to bid release for input regarding bid requirements to establish the following:

1. Obtain the funding information for the bid project from the specialist or department head for inclusion on the bid tabulation.
2. Take notes concerning the discussion to develop the criteria for special conditions and bid specifications which the specialist/department head requires to be included in the bid.
3. Discuss the possibility of piggybacking off another existing bid from other school districts or governmental agencies, or if using State Contracts to acquire the goods or services needed in lieu of developing an in-house competitive solicitation. Search the bid databases for NIGP or FAPPO for similar bids to use as an information source for bid language or to locate vendors to increase competition. ***Florida Statutes require that Florida State Contracts be considered first before a bid is issued.***
4. Ask the specialist if they know of any vendors who are able to supply the item and/or services being bid. Get full name of company, address, email address, phone number and Sales Representative's name, if available.
5. Discuss the need for a prebid conference to clarify any and all concerns or issues vendors may have with the specifications in the bid or the procedure outlined to evaluate the bid results. For complicated bids or other solicitations, the use of a prebid conference can avoid confusion and help to improve the vendor's understanding of what the district is requesting.
6. Complete the Bid Information Sheet to establish a realistic time line for completing the bid. Some of the dates to highlight are: bid release date, public opening date and time, agenda conference date, and board date for approval of the bid. This document is part of the permanent bid file.

BID PREPARATION

Invitation To Bid: An Invitation to Bid is a written solicitation for competitive sealed bids for goods or services with the title, date, and hour of the public bid opening designated. It includes instructions describing all conditions for bidding and is released to all prospective bidders simultaneously. The ITB (Invitation To Bid) will be used to solicit bids from three (3) or more sources for all purchases or contracts for commodities and/or services that exceed the maximum amount allowed by law, except for items specifically exempt by law or rule. (See Section: State Board Regulations 287.012 Category II, Fiscal Policy 702, and Department of Education Administrative Rule 6A-1.012)

The following procedures are to be used when preparing a formal bid for release.

1. Buyers are to **request a Bid Number from the Office Specialist III** and indicate which Board date they are attempting to meet for Board Approval.
2. The **Office Specialist** handle all clerical functions as soon as the bid number is established. The Buyer will work closely with the Office Specialist until the bid has received Board approval, all award notifications have been sent and the bid file has been turned over to the Buyer. Communication between Buyer and Office Specialist is important to keep everyone informed of the bid's progress to completion. If the Buyer is not available, the Office Specialist should be able to answer any questions regarding the status of the bid.
3. **Complete a Bid Information Sheet** to develop a time-line for the bid. Discuss your proposed time-line with Purchasing Supervisor to confirm dates for:
 - Pre-bid Conference (if applicable to this bid)
 - Commodity Number
 - Effective Contract Period
 - Release of Bid
 - Bid Opening – Date & Time
 - Evaluation Committee Meetings (if required, must be publicly advertised)
 - Agenda Conference
 - School Board Meeting (for Approval)
4. **A complete bid**, or bid package, is composed of the following:
 - A. Bid Release Notice
 - B. Bid Cover Sheet with Mailing Label (contains Bid Number, Return Date, and Bid Opening Time)
 - C. Invitation to Bid (ITB)
 - D. Set of Bid Specifications - includes Special Conditions and Bid Response Forms
 - E. Debarment Forms – Regular (for purchases that exceed \$100,000.00) and/or Federal (for items that involve Federal expenditures)
 - F. Notice to vendors regarding overnight/express deliveries

BID PREPARATION - Continued

5. **BID FOLDER SETUP: (Buyers are responsible for the proper maintenance of bid folders.)**
 A bid folder is prepared and labeled in the upper left hand corner of red rope file with the bid number, name of bid, the date and time scheduled for bid opening, and the effective bid period. (Bid contract dates).
Sequence of bid folders -- front to back -- shall be assembled in the following manner, and, where appropriate, all sections are to be in alphabetical order:

Note: Bid folders are audited annually and proper maintenance of bid file is imperative.

- Original tabulation with summary sheet; stamped with board approval date
 - Copy of tabulation with summary sheet
 - Recording documents
 - Vendor's bid responses
 - ✓ In alphabetical order by vendor
 - ✓ All vendor correspondence and literature/catalogs attached
 - Copy of Envelope with date/time stamp received by Purchasing Department
 - No bids (if any)
 - Late bids (if any)
 - Returned bids (if any)

 - *Manila Folder*
 - ✓ Bid Information Sheet
 - ✓ Sign-In Sheet(s)
 - ✓ Check-In Sheet
 - ✓ Original Bid
 - ✓ "Samples" Listing (if any)
 - ✓ Correspondence
 - ✓ Notice of Bid Release Form and email responses from vendors
 - ✓ Notice of Board Approval Tab and email responses from vendors
 - ✓ Approval for Bid Release
 - ✓ Signed Bid Tab Package Form

 - Draft Folder
 - ✓ All drafts of bid (numbered)
 - ✓ All drafts of tabulation (numbered)
 - ✓ Worksheet (if applicable)
6. **Preparation of the bid documents.** The previous bid documents should be used as a guide for developing current specifications for a repetitive bid.

Requests are received from schools/departments and a meeting is scheduled to review bid requests, requirements and specifications. The items to be bid are researched through catalogs, literature, internet resources and vendor input to develop concise specifications.

BID PREPARATION - Continued

At times manufacturers, and or vendors, may be contacted to review the preliminary bid specifications to assist in verifying that the specifications identify minimum requirements and are adequate to assure that several vendors will be capable of bidding on the item(s) being solicited. When applicable, a copy of the bid specifications is submitted to the Contract Administrator or Department Head for input and approval prior to releasing the bid package.

7. **Proof bid for accuracy and make any necessary changes prior to seeking approval from the Department Manager or requesting Agency/Department** to release (email) the bid specifications. (Use the Bid Release Approval Form; a sample of this form follows the Bid Preparation section.)
8. **All bids must be approved for release by the Purchasing Supervisor.** Any changes made to the documents will be discussed with the Buyer before the Office Specialist makes the necessary corrections to the bid before it is posted on VendorLink.
9. **Vendors may access any released bids on our website (the address is www.volusia.k12.fl.us/purchasing).** Bids may also be viewed on Vendor Link.
10. **Buyers, and Clerks when requested, shall record any questions received or responses given to and/or from vendors,** whether verbal or written, concerning the bid for purposes of filing same in the bid manila folder.
11. **Addenda:** If after releasing a bid, a change or correction is deemed necessary, an addendum is prepared and posted on VendorLink.
12. **Recording sheets are prepared by the Office Specialist to be used at the bid opening.** The bid opening may be recorded in data spreadsheets instead of by hand.

REQUEST FOR PROPOSAL (RFP)

Definition: A written solicitation for competitive sealed proposals with the title, date, and hour of the public opening designated. The RFP is used when the department or user is incapable of specifically defining the scope of work for which contractual services or products are required, and when the Department is requesting that a qualified vendor propose a contractual service to meet the specifications of the solicitation. A Request for Proposal includes, but is not limited to, general and special conditions, applicable laws and rules, functional or general specifications, statement of work, proposal instructions, and evaluation criteria (relative importance of price and other evaluation criteria).

REQUEST FOR PROPOSAL (RFP) - Continued

The Evaluation Team and/or Committee (when required) is responsible for:

1. Establishing the criteria for evaluation of the technical proposals and price proposals.
2. Determining if vendors are qualified to provide products/services required to meet desired result.
3. Determining if proposals are responsive to the RFP.
4. Rating of technical proposals based on the criteria established. Evaluation team members may conduct these ratings independently or as a group – or both.
5. Participating in ranking of price proposals.
6. Jointly determining the overall recommendation of award to the Board.
7. Preserving all documents used to make any and all decisions related to the recommendation of award of an RFP. These documents must be returned to the Purchasing Department for inclusion in the RFP original file.

BID EXCEPTIONS

The requirement for requesting bids from three (3) or more sources is hereby waived by Florida Statutes and Volusia County School Board Fiscal Policy 702-Section V regarding bidding procedures.

ITEMS EXEMPT FROM FORMAL BID PROCEDURES:

- *Education Materials (Textbooks, testing materials, copyrighted materials, a/v equipment, etc).*
- *Emergency Purchases that avoid an immediate danger to the public health, safety or welfare*
- *Funds Handled in Trust for Individuals (class jewelry, yearbooks, caps & gowns, etc.)*
- *Gasoline and Diesel Fuels*
- *Information Technology*
- *Insurance and Risk Management – Except as required by Statute*
- *No Response(s) Received from Solicitations*
- *Goods and Service bid by other governmental agencies (In and Out of State)*
- *Pool Purchases*
- *Produce and other Food Products, Except Milk*
- *Professional Services – Academic program reviews, lecturers, auditing services, legal services, health and diagnostic services, mediator services*
- *Single Source Proposals*
- *Sole Source Proposals*
- *Utilities/Governmental Franchised Services*

Reference to these exemptions is found in State Board of Education Rule: 6A-1.012, and Volusia County Schools Fiscal Policy 702, Section V.

BID EXCEPTIONS - Continued

Piggybacking Contracts/Bids: Volusia County School Board policy and DOE rules allows for the purchase of goods and services from other governmental contracts, i.e., other school boards, cities, counties, colleges & state universities, and State of Florida agencies, as well as out-of-state governmental agencies. A complete piggybacked bid, including Contract Signature Page, Owning Entity's Agreement and Tabulation and any addenda issued, must be on file before requesting board approval to expend district funds. No monies are to be spent prior to board approval.

Sole Source Purchases: Definition – A single source commodity is defined as a product or service that is non-competitive in price and/or specification and is available only from one source of supply.

A purchase order may be issued without competitive bidding when the Director of Purchasing determines in writing, after conducting a good faith review of available sources, that there is only one source of the required supply, service, equipment or construction item. When the purchase amount requires board approval, the user shall provide a letter of recommendation to the Purchasing Department stating why it is a sole source item. The Buyer will forward a justification form to be completed by the person requesting the sole source item. This statement shall set forth the purpose and document why the item is the only one that will produce the desired results.

Sole source items exceeding the bid threshold must be presented to the Board for approval as a separate line item in the consent agenda. The Purchasing Director will submit a letter to the superintendent justifying the sole source and requesting board approval be granted. Expenditures for sole source items are not to be made prior to board approval for items over the stated established bid threshold amount. See Policy 702 Section V, M.

BID OPENINGS

Vendor Bid Responses

When bid responses are submitted by vendors, they are to be placed in a secure location (i.e., locked file cabinet). Responses shall be date and time stamped when received. The stamping is to be legible and placed on the document so that it does not obstruct information contained on the envelope. The Office Specialist assigned to each bid is responsible for recording the receipt of the bid on the Bid Check-In Sheet, and then placing the bid in the bid folder pending date of opening.

Appropriate Personnel Shall Attend the Formal Bid Opening

1. Prior to the bid opening, the Office Specialist assigned to the bid records each bid received on the appropriate recording documents or directly into the computer spreadsheet.
2. The Buyer reads the vendor's name and address and returns the bids to the Office Specialist upon completion of the bid opening.
3. The Office Specialist makes a copy of all date/time stamped envelopes of bids received and places the copy in back of each bid response.
4. The Office Specialist will prepare the computer tabulation using the original bid response sheets submitted by each responding vendor. Buyer and Office Specialist will proof the validity of the numbers using the original response sheets.

BID OPENINGS - Continued

Office Specialist Responsibilities

1. Prepare sign-in sheets for signatures of those who attend public openings.
2. Sample Listing Sheet, if required, showing the vendors who have submitted timely sample products.
3. To acknowledge on the check-in sheet those bids received from prospective bidders, including no-bids returned and undelivered bids returned from the postal service.
4. Names of responding bidders are entered on the recording sheets.
5. Bring all bid responses, sign-in sheets, and copies of the recording sheets to the bid opening.

Buyer Responsibilities

1. To attend the pre-bid conference, if applicable, to answer any questions from vendors, and to make any changes required by the issuing of an addendum to the bid.
2. To attend the bid opening and direct the recording of the bids.
3. To validate the sign-in sheet by making sure everyone present at the pre-conference and/or bid opening signs the sign-in sheets for purposes of recording the bid attendance. This record will become part of the permanent bid file.
4. To provide vendors with information regarding the status of the bid evaluation and the estimated time required to post the bid tabulation.

Samples Listing: Bid samples, if required, must be furnished free of expense to the board prior to the opening of the bid. Samples are to be labeled with the bid number, company name, and item description. A 'samples' listing will be compiled by the Office Specialist indicating the companies who have submitted timely samples and the brand(s) being offered as alternative bids. Samples not consumed in testing and/or evaluation will become the property of the School Board if not picked up by the vendor after 30 days of the bid opening. Shipping charges for the pickup and return of supplies shall be the responsibility of the vendor/bidder.

Bid Opening Date: Bids are normally scheduled for opening at 2:00 P.M. **Bids are opened promptly at the designated time.**

Late Bids: Bid responses received late – after the published opening date and time – will be rejected regardless of the degree of lateness or the reason related thereto, including causes beyond the control of the bidder. Late bids will not be opened and may, at a vendor's request, be returned to the vendor at their expense. Vendors who arrive late may still attend the public opening and be given recording sheets, if available.

BID OPENINGS - Continued

Public Attendance: All bidders and the public are invited to attend, but it is not necessary. Prior to the bid opening, the Office Specialist will prepare a sign-in sheet for persons who attend the bid opening, including vendors and school representatives. The sign-in sheet will become part of the permanent bid file and all attendees are requested to sign the sheet. The names of the responding bidders will be read aloud at the designated time and place. No activity on the part of the bidders at an opening, other than attendance or note taking, is permitted. Any attempt to qualify or change any bid by a bidder may result in the rejection of that respondent's bid.

The Office Specialist will record the bid information, as the Buyer reads it, on the recording document -- the recording sheet. The tabulation results will be entered into the computer directly from the vendor's response sheets. A DRAFT COPY of the tabulated results will be used during the evaluation process to determine the recommendation for award.

Inspection of Bids: Inspection of sealed bid responses will be made available to interested parties upon notice of recommendation for award (posting of the tab).

BID EVALUATIONS/Recommendation of Award:

After the bid opening is concluded, the evaluation process begins.

Buyer and Office Specialist shall proof the tabulation against the original bid documents. For very detailed tabulations, the Buyer can request another Buyer and Office Specialist to re-proof the tabulation to ensure its integrity. It is very important that the results of the bid tabulation are accurate. The recommendation of award to the School Board is based on the information contained in the tabulation – it should be error-free.

In the event of an error in a bid response, a unit price may not be changed. However, if the error is in the extended price, the vendor is called and notified of the error. The correct extension will be used in the bid evaluation calculations to determine the overall lowest and best bidder. A vendor may elect to make a request to withdraw his bid from consideration. The person who originally submitted the bid response must do this in writing before the Buyer may take any action in regard to a request to withdraw from consideration. Support documentation must be filed in bid folder to document any action taken by the Buyer.

BID EVALUATIONS - Continued

Bid Mistakes and/or Withdrawals

1. **Corrections to Bid** If a bidder makes a mistake in their bid, they may modify a previously submitted bid at any time prior to the bid due date and time. Requests for modification of a submitted bid shall be in writing and shall be signed in the same manner as the original bid. Upon receipt and acceptance of such a request, the entire bid will be returned to the bidder and will not be considered unless resubmitted by the scheduled due date and time of bid opening. After the opening, prices bid must stand as submitted. All bids submitted must be firm for the minimum time stipulated in the bid document.
2. **Withdrawal of Bid** A bidder may withdraw a bid at any time prior to the scheduled opening of the bid. Requests to withdraw a submitted bid shall be sent to the Coordinator of Purchasing in writing on company stationery. The person making the request to withdraw the bid must be an authorized employee of the firm whose bid is being withdrawn. The document must state the name and title of the person signing the request and include the reason for the withdrawal.

A bidder may not withdraw a bid without good cause after the designated time for the opening of bids. Good cause shall be defined as a clear error. An example of a clear error would be a price submitted as \$1.00 each instead of \$100.00 each. If a bidder wishes to withdraw a bid after the deadline, a written request on company stationery to the Purchasing Department stating the reasons for the desired bid withdrawal shall be submitted for consideration by the board, or its designee. The signature must be the same name as the person who signed the Invitation to Bid cover letter conveying their offer to the school district.

If the board has already awarded the item(s), the written request seeking withdrawal of an item(s) will be submitted to the Supervisor of Purchasing for consideration. If the withdrawal will cause the school district to incur a monetary loss due to purchasing at a local source to avoid an out-of-stock situations, or by having to pay an increased price to the next lowest and best bidder; restitution may be sought from the vendor wishing to withdraw his bid after award. In addition, if a vendor's request to withdraw seems unreasonable to the district, the vendor may be asked to withdraw from the entire bid. A vendor may be prohibited from future bidding with the district if deemed to be an irresponsible bidder.

BID EVALUATIONS - Continued

Identical Low and Best Bids - Tie Bids: If identical low and best bids are submitted, the following criteria shall be utilized in order to determine which vendor shall be recommended for the awarding of the item.

1. Certification under Florida Statutes as a drug-free workplace
2. In-County preference – Volusia County vendors
3. Company receiving the larger dollar award of the bid
4. Coin toss

The coin toss will be held in the Purchasing Department by the Buyer and witnessed by a minimum of one other employee. The vendors involved in the coin toss will be telephoned prior to the coin toss being held. After the coin toss has been executed, a notation is made on the tabulation and notification of the result is given to the affected vendors. The names of the witnesses will be documented in the bid folder.

Buyer Responsibilities:

1. Determine the apparent low bidder from qualified bids received.
2. When approved brand(s) and model number(s) are stated in bid, make sure vendor bid on the specific approved brand(s) and/or model number(s).
3. When specification states “or equal”, make sure item is equal to, or exceeds, all specification(s) as outlined in the bid.
4. If samples are requested, document receipt of the samples in bid folder.
5. Buyer may request evaluation/product testing by expert(s) for “or equal” brands submitted to make sure that the products being offered will meet bid specifications.
6. Buyer ensures that the following are completed in its entirety and accompany bid (if it applies):
 - a. All technical data
 - b. Insurance forms
 - c. Warranties
 - d. Debarment Forms - U.S. Department of Agriculture, if Federal money is involved – Regular Debarment for all other funds.
 - e. Copies of Material Safety Data Sheets – MSDS Sheets (originals go to Safety Dept.)
 - f. Nutritional data sheets – Food bids.
 - g. Acknowledgment(s) signed for addenda issued to bid.
 - h. Bonds and/or Cashiers Checks
 - i. Samples

BID EVALUATIONS - Continued

7. Check unit price and extensions on bid response forms. Check information requested to help determine evaluating items bid, such as, unit of measure, case price, pkg. size, yield/per serving, how many per case, minimum case shipment, brand bid, product numbers, business references, delivery dates, and length pricing will hold.
8. Verify all total extensions for bids meeting specifications, by group and by items, and indicate it on bid tabulation sheet(s).
9. Note reason why any low bid was not accepted, by assigning an alphabetical designator to indicate reason(s) for non-compliance on bid tabulation. (i.e., A-Does not meet bid specification, B-No sample submitted as specified, etc. The letter "O" is not used in the alphabetical sequence because it may be mistaken for a zero.) (**Reference Sheet: "Standard Bid Tabulation Reasons" page 75.**)
10. Place an asterisk* on the lowest acceptable bid price for each grouping and/or items recommended for award on the bid tabulation.
11. Review the final Bid Tabulation indicating recommendations of award to make sure there are no errors in the proposed recommendations.
12. Verify references. Buyer should also attempt to contact any licensing agency the responding vendors may fall under as back-up information in addition to the references submitted by responding vendor(s).
13. Request vendor to submit any additional clarification or information needed for bid documentation.
14. Resolve any tie bids. See Identical Low and Best Bids - Tie Bids Information in this section (page 73).
15. For certain solicitations, submit bid bonds and/or certified cashiers checks, to the Office Specialist to be placed in the fire file and held until the end of the contract period if required of the successful vendor. The bid bond and/or certified cashiers check shall be returned to the awarded vendor at the end of the contract period. Any bid bonds and/or certified cashiers checks held for unsuccessful bidders will be returned at the conclusion of bid process.
16. Make necessary notations on bid tabulation draft and submit to Office Specialist for preparation of the final bid tabulation. The final bid tabulation is to be approved by the Purchasing Supervisor, prior to posting on the Purchasing Department Bulletin Board website and Vendorlink.

After it has been properly evaluated and proofed, the final bid tabulation will reflect the Purchasing Department's recommendation of award which is submitted to the Board for approval.

Note: The Purchasing Department does not have the authority to award bids. It only makes recommendations to the Board based upon evaluation of the bid responses.

BID EVALUATIONS - Continued

STANDARD BID TABULATION REASONS

1. Asterisk (*) references Recommended Lowest Acceptable Bid.
2. Absence of asterisk indicates No Recommendation.
3. No sample as specified.
4. No literature submitted for evaluation as specified.
5. Literature does not match brand/model bid.
6. Insufficient literature for evaluation.
7. Did not bid all items in all or none group.
8. All or none is less than individual award.
9. Individual award is less than all or none.
10. Item bid is smaller size than specified.
11. Tie Bid - Awarded per Policy 702, Section IV (G).
12. Must be awarded with item ____ for compatibility.
13. Prices hold ____ days and not ____ days as specified.
14. Vendor requests permission to withdraw bid -- cannot (state reason).
15. District cannot meet vendor's minimum order requirement(s).

Posting of Bid Tabulation

The bid tabulation showing results and recommendations for award(s) is posted on the Purchasing Department's website for a period of seventy-two hours (72 hrs.) and is also posted on Vendorlink. Public inspection is invited. The purpose of posting the bid tabulations is two-fold. First, it is a public notice of pricing received from the bid solicitation; and secondly, it gives responding vendors an opportunity to protest the proposed recommendation(s) of award to the Board. After the bid has been awarded by the Board, the bid tabulation is stamped with the "Board Approved" date stamp and posted on VendorLink.

Awarding of Bids

Competitive solicitations (bids) shall be presented to the School Board for approval before any monies are expended to acquire the item/service. The School Board shall have the authority to reject any and all bids and/or to request new bids. In acceptance of bids, the School Board shall accept the lowest and best bid from a responsive and responsible bidder who meets or exceeds all bid specifications. (Fiscal Management Policy 702, Section IV (E))

BID EVALUATIONS - Continued

Completion of Bid Evaluation Process

The Office Specialist will organize the bid folder in the manner described in the bid folder setup guidelines. Buyers shall also maintain their individual bid status lists for purposes of monitoring the progress of each bid.

Reasons for Disqualified or Rejected Bids:

1. Bidder is currently listed among "debarred" bidders, or is on the State's Suspended Vendors Listing.
2. Failure to submit required proof of insurance and/or to name the district as an additional insured on their policy as specified in bid criteria.
3. Failure to meet specified delivery or performance schedules as outlined in bid.
4. Failure to price out the bid in conformance to the required format, or if vendor qualifies price to protect the bidder from unknown future market conditions.
5. Rights of the purchasing agency limited, or changed, under any contract clause.
6. Failure to submit bid deposit or surety (Bid Bond and/or Certified Cashier's Check).
7. Reasonable basis to suspect either conflict of interest or collusion among bidders.
8. Bidder fails to submit required information, literature, samples, or affidavits with bid.
9. Late bids - bid received after stated opening time on the due date.
10. Other reasons that may be unique to a specific bid or solicitation.

BID FILE MUST INCLUDE A WRITTEN STATEMENT WHICH OUTLINES THE REASON(S) FOR THE DISQUALIFICATION.

RE-BIDS

Florida State Board Regulations give the School Board the authority to reject any and all bids and to request new bids. (6A-1.012 (8))

There are several instances where it would be feasible to recommend to the board that a competitive solicitation be re-bid. This action is very costly to the district and is used only when it is in the best interest of the district to do so.

1. Where there are no responsive and responsible bidders. All responding bidders failed to provide the product or service required.

RE-BIDS - Continued

2. The cost to obtain the item is out-of-line with current market conditions. All responding bidders bid an exorbitant price for item or service bid.
3. Pricing cannot be held for duration of bid period. If market conditions are volatile and responding bidders are unable to guarantee pricing for the length of bid period, it may be in the best interest of the district to reject all bids and re-bid at a later date, or to re-issue the bid with a change in the term of the contract to a shorter period of time.
4. Bid specifications were too restrictive and/or poorly defined. If the current bid specifications limit the potential competition by causing confusion and/or limiting the ability of vendors to submit a responsive bid, a re-bid may be necessary to remedy the situation.
5. Failure to perform services and/or deliver product specified in a timely manner according to bid specifications. If an awarded vendor fails to comply with all bid specifications, the Board has the option to rescind the award and request a re-bid.

It is important to be aware of the potential causes of re-bids so every effort is made to avoid them.

NON-PERFORMANCE OF AWARDED VENDORS

Should the awarded vendor fail to meet any requirement of the specifications, the vendor can be cited for nonperformance. The seriousness of nonperformance must be evaluated based on the circumstances surrounding each violation. If the awarded vendor fails to perform in accordance with the terms and conditions of the contract, the Buyer may pursue these options if deliveries of goods/services are delinquent or are not being made within a reasonable time.

1. Exercise the rights afforded by the performance bond and/or liquidated damage clause, if applicable. A performance bond guarantees that the product furnished or work contracted for will be done according to specifications and within the time frame specified. It provides for the buyer's costs if it becomes necessary to purchase from or contract with another source. Liquidated damage clauses stipulate in advance of the procurement the procedures to be used in determining the costs and damages for nonperformance. In some cases, specific payments are stated as "x" dollars per day for late delivery. When determining the amount for either performance bonds or liquidated damages, it is important to select a figure that is a reasonable estimate of the probable loss to the district because of the delay and/or nonperformance. These devices may not merely be used as a means of imposing a penalty on the awarded vendor.

NON-PERFORMANCE OF AWARDED VENDORS- (Continued)

2. Obtain the needed items from another source and charge the delinquent vendor the excess difference in cost. This action is often the most appropriate since the supplier normally has the prerogative of obtaining items from another supplier if the situation demands it. However, obtaining the delinquent items from another source is not always an acceptable solution since additional delivery time may be required. A revised delivery schedule with the initial supplier may be the best remedy.
3. Terminate the contract for default if it is in the best interest of the School Board provided that the items can be obtained from other sources within an acceptable timeframe and within cost limits.

BID PROTEST

Once bids are received, tabulated and evaluated, the notice of recommendation to award (the tabulation) shall be posted on Vendor Link and on the district's purchasing website at www.volusia.k12.fl.us/purchasing, for a period of seventy-two hours (72 Hrs.), excluding holidays and weekends. The notice shall contain the statement: "Bidders are hereby notified that failure to file a protest within the time prescribed in Section 120.57 (3) Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes." Once the tabulation is posted, any bidder who is adversely affected by the recommendation to award shall file a written Notice of Protest with the Coordinator of Purchasing within the seventy-two (72) hour time period. After submission of the Notice of Protest, a vendor has ten (10) calendar days to file a formal written protest. The formal written protest shall state with particularity the facts and the law upon which the protest is based. Filing a formal written protest shall stop the award process until such time as a final ruling is made or the matter is otherwise resolved, unless the board finds that stopping the process poses an immediate and serious danger to the public health, safety or welfare. Failure to file a Notice of Protest and a formal written protest in a timely manner shall constitute a waiver of proceeding under this policy.

Upon receipt of the formal written protest, the Coordinator of Purchasing shall examine the issues surrounding the protest and determine if a meeting of all parties is necessary to resolve the matter. The meeting shall take place within seven (7) calendar days after receipt of the Formal Written Protest.

If the protest is not resolved and the bidder wishes to present the protest to the Board, they may do so at the Board meeting at which the subject bid is scheduled to be voted on, provided written notice of intent to do so is delivered to the Coordinator of Purchasing by the end of the business day on the Friday prior to the date of that Board meeting. Failure to file this notice in a timely manner shall constitute a waiver of proceedings under this policy.

BID PROTEST - Continued

If the parties cannot come to an acceptable resolution, the Department of Administration, Tallahassee, Florida will schedule a formal hearing date within fifteen (15) calendar days from the date the Formal Written Protest was filed. The Department of Administration will render a decision based upon the testimony and its relevancy of applicable law(s).

The district's legal staff will present the Department of Administration's decision to the Board for the Board's final acceptance or rejection of the decision rendered. In all cases, the final decision authority shall rest with the School Board.

REFERENCE: School Board Policy 702, Section IV (D) Resolution of Bid Protests

Bid Renewal/Extension/Expiration

Prior to Bid Expiration:

1. Buyers should verify that the services/items are still required by the school/department.
2. Buyers should research market conditions, as well as other districts and governmental agencies for bid pricing, to get a feel for the current pricing structure of the items being bid. Be prepared to make a recommendation as to whether it will be in the district's best interest to renew, extend, piggyback or too re-bid.
3. Contact the Specialist of department(s) and/or school(s) to establish whether to consider renewing the bid after analysis has been completed.
4. Discuss with awarded vendors our intent to renew, extend, or put out a new bid for the items they are currently awarded. Give awarded vendors a time-line so they will know the approximate dates for any new solicitation. Courtesy goes a long way in building solid vendor relationships.
5. Have the vendor sign the Renewal Letter.

PREPARATION OF AGENDA CONFERENCE MATERIAL

Agenda conferences are held as scheduled by the Superintendent of Schools. The Agency Clerk distributes a calendar listing all board meetings, agenda conferences and pre-board meetings. The calendar is then distributed to the Purchasing Department staff for use in board date selection for competitive solicitations. The Office Specialist will prepare the Agenda Items for each board date.

The Office Specialist who has been assigned to the bid will prepare and complete the tabulations for bids. Buyers are to prepare the Bid Summary Sheets for each of their bids. To easily identify the recommendations of award on the final tabulation, the awarded vendor's price(s) shall be shown with an asterisk (*) and the estimated total price will be bold typed for emphasis. Prior to posting, the Purchasing Supervisor shall sign the final tabulation to indicate that the proposed results have been verified. The proofed tabulation shall be posted for seventy-two hours. The Office Specialist will submit the recommendation for bid award(s) on the School Boards Agenda website for presentation to the agenda conference. If the agenda is accepted as submitted, notification of the accepted agenda will be posted. Occasionally, the Board pulls a bid from the Consent Agenda for additional discussion at the board meeting.

Non-Consent Agenda

Occasionally at the agenda conference, a bid is removed from the consent agenda for additional discussion by the board members. The Purchasing Department will be advised when a bid is removed from the agenda so additional information may be given to support the recommendation(s) to the board. After the requested additional information is prepared and reviewed, a Non-Consent Cover Sheet shall be completed and re-submitted to the Coordinator of Purchasing for the Administrative Services office. The Agency Clerk will assign an exhibit number for the Non-Consent Item(s) to be presented to the Board for discussion and approval.

Supplement Agenda Bids

Bids that will **not** meet the regular scheduled Agenda Conference, for whatever reason, must be submitted on Board Docs as a "Place Holder" with the notation that more information is to come. A representative from the Purchasing Department must be present at the Agenda Conference to explain why the bid did not meet the scheduled agenda date. The deadline for submitting the completed bid documents for the Place Holder is one week from the Agenda Conference date; no later than the Monday following the Agenda Conference. This is because the Agenda Conference items are posted for public viewing one week (the following Tuesday) after the Agenda Conference.

Volusia County School Board - Purchasing Department

REQUEST FOR BID RELEASE

DATE:

TO:

FROM: _____; Buyer, Purchasing Department

SUBJECT: Bid Specifications for Bid No. _____

Please review the attached specifications and make any necessary corrections or additions.

Sign the form below and return to the Purchasing Department as soon as possible. The bid will be mailed to vendors after corrections are made and upon receipt of this signed request.

Thank you for your cooperation.

_____ All specifications are in order. The bid may be released.

_____ Corrections have been made in RED INK. The bid may be released after all corrections have been completed.

Signature

Date Approved
Volusia County School Board - Purchasing Department

BOARD APPROVED TABULATION RESULTS PACKAGE

DATE:

TO:

BID REQUEST:

BOARD APPROVAL DATE:

Enclosed is a copy of:

_____ Original Bid

_____ Addendum(s)

_____ Board Approved Tabulation

_____ Awarded Vendors Response Forms

_____ Any Additional Ordering Information

If you have any questions, please feel free to call _____, Ext._____.

Please sign and return to the Purchasing Department., Attn.:_____.

Thanks for your prompt attention in this matter.

I have received all the ordering information on the above referenced bid.

SIGNATURE/TITLE

DATE

**FLORIDA DEPARTMENT OF EDUCATION
STATE BOARD ADMINISTRATIVE RULES**

6A-1.012 Purchasing Policies -- This Administrative Rule is set by the Department of Education and is revised periodically. For the latest version go on-line to get the current language and bid threshold limits. **The following rule was adopted on February 25, 2009.**

Each district school board shall establish purchasing rules which shall include but not be limited by the following:

- (1) Definitions:
 - (a) The term “**competitive solicitation**” shall be defined for the purposes of this rule to include purchasing made through the issuance of an invitation to bid, request for proposals and invitation to negotiate. Competitive solicitations are not required for purchases made through the pool purchase provisions of Section 1006.27, Florida Statutes.
 - (b) “**Invitation to bid**” shall be defined for the purposes of this rule as a written solicitation for competitive sealed bids. The invitation to bid is used when the district school board is capable of specifically defining the scope of work for which a contractual service is required or when the district school board is capable of establishing precise specifications defining the actual commodity or group of commodities required. A written solicitation includes a solicitation that is publicly posted.
 - (c) “**Invitation to Negotiate**” shall be defined for the purposes of this rule as a written solicitation for competitive sealed replies to select one or more vendors with which to commence negotiations for the procurement of commodities or contractual services. The Invitation to Negotiate is used when the district school board determines that negotiations may be necessary for it to receive the best value. A written solicitation includes a solicitation that is publicly posted.
 - (d) The term “**proposer**” shall be defined for the purposes of this rule to include those vendors submitting bids or responses to a competitive solicitation.
 - (e) “**Request for Proposals**” shall be defined for the purposes of this rule as a written solicitation for competitive sealed proposals. The Request for Proposals is used when it is not practicable for the district school board to specifically define the scope of work for which the commodity, group of commodities, or contractual service is required and when the district school board is requesting that a responsible vendor propose a commodity, group of commodities, or contractual service to meet the specifications of the solicitation document. A written solicitation includes a solicitation that is publicly posted.
 - (f) The term “**superintendent**” shall be defined for the purpose of this rule to mean “superintendent or designee”.

**FLORIDA DEPARTMENT OF EDUCATION
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(2) The superintendent may be authorized to purchase commodities or contractual services where the total amount does not exceed an amount prescribed by the school board, and does not exceed the applicable appropriation in the district budget. The superintendent may also be authorized to purchase commodities or contractual services under Department of Management Services state term contracts. Assistants functioning under the superintendent's direction may be authorized to perform these purchasing tasks. No person, unless authorized to do so under rules of the district school board, may make any purchase or enter into any contract involving the use of school funds; no expenditures for any such unauthorized purchase or contract shall be approved by the school board.

(3) Before making any purchase of commodities or contractual services which the superintendent is authorized by the school board to make or before recommending any purchase to the district school board, the superintendent shall, insofar as possible, propose standards and specifications. He or she shall see that the commodities or contractual services conform to those standards and specifications, and shall take such other steps as are necessary to see that the maximum value is being received for any money expended.

(4) In each school district in which the purchasing agent for any public agency is authorized by law to make purchases for the benefit of other governmental agencies within the county, the district school board shall have the option to purchase under the current contracts as may be established for any of the public agencies as set forth above at or below the unit price stated therein, if such purchase is to the economic advantage of the school board, subject to conformance of the items of purchase to the standards and specifications prescribed by the superintendent for said district.

(5) As required by Section 1001.42(10)(j), Florida Statutes, the district school board shall receive and give consideration to the prices available to it under rules of the Department of Management Services, Division of Purchasing. District school boards may use prices established by the Division of Purchasing through its state purchasing agreement price schedule. If district school board policy provides for purchasing under this program of state purchasing agreements, the conditions for use shall be those imposed on state agencies.

(6) In lieu of requesting competitive solicitations from three(3) or more sources, district school boards may make purchases at or below the specified prices from contracts awarded by other city or county governmental agencies, other district school boards, community colleges, federal agencies, the public or governmental agencies of any state, or from state university system cooperative bid agreements when the proposer awarded a contract by another entity defined herein will permit purchases by a district school board at the same terms, conditions, and prices (or below such prices) awarded in such contract, and such purchases are to the economic advantage of the district school board.

(7) Except as authorized by law or rule, competitive solicitations shall be requested from three (3) or more sources for any authorized commodities or contractual services exceeding \$50,000.00. Districts may not divide the procurement of commodities or contractual services so as to avoid this monetary threshold requirement. District school boards, by rule, shall set this amount or a lesser amount and shall establish purchasing policy relative to purchases of a dollar value less than this formal monetary threshold.

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(8) The district school board shall have the authority to reject any or all proposals submitted in response to any competitive solicitation and request new proposals or purchase the required commodities or contractual services in any other manner authorized by this section.

(9) In acceptance of responses to invitation to bid, the district school board may accept the proposal of the lowest responsive, responsible proposer. In the alternative, the district school board may also choose to award contracts to the lowest responsive, responsible bidder as the primary awardee of a contract and to the next lowest responsive, responsible bidder(s) as alternate awardees from whom commodities or contractual services would be purchased should the primary awardee become unable to provide all of the commodities or contractual services required by the district school board during the term of the contract. Nothing herein is meant prevent multiple awards to the lowest responsive and responsible bidders when such multiple awards are clearly stated in the bid solicitation documents.

(10) In acceptance of responses to requests for proposals, district school boards may award contracts to one or more responsive, responsible proposers in accordance with the selection criteria published in the request for proposal. The district school board is not required to request proposals for purchases made from contracts of the Department of Management Services as referenced in subsection (2) and (5) of this rule.

(11) The requirement for requesting competitive solicitations for commodities and contractual services from three (3) or more sources is hereby waived as authorized by Section 1010.04(4)(a), Florida Statutes, for;

(a) The purchase by district school boards of professional services which shall include, without limitation, artistic services; academic program reviews; lectures by individuals; auditing services not subject to s.218.391; legal services, including attorney, paralegal, expert witness, court reporting, appraisal or mediator services; and health services involving examination, diagnosis, treatment, prevention, medical consultation or administration; and

(b) the purchase by district school boards of educational services and any type of copyrighted materials including, without limitation, educational tests, textbooks, printed instructional materials, computer software, films, filmstrips, videotapes, dvds, disc or tape recordings, digital recordings, or similar audio-visual materials, and for library and reference books, and printed library cards where such materials are purchased directly from the producer or publisher, the owner of the copyright, an exclusive agent within the state, a governmental agency or a recognized educational institution; and

(12) Additional exemptions authorized under certain conditions.

(a) The requirements for requesting competitive solicitations and making purchases for commodities and contractual services as set forth in this section are hereby waived as authorized by Section 1010.04(4)(a), Florida Statutes, when the following conditions have been met by the district school board:

**FLORIDA DEPARTMENT OF EDUCATION
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1. Competitive solicitations have been requested in the manner prescribed by this rule, and
2. The district school board has made a finding that no valid or acceptable firm proposal has been received within the prescribed time.

(b) When such a finding has been officially made, the district school board may enter into negotiations with suppliers of such commodities and contractual services and shall have the authority to execute contracts with such vendors under whatever terms and conditions as the district school board determines to be in its best interests;

(c) If less than two responsible proposals for commodity or contractual services are received, the district school board may negotiate on the best terms and conditions or decide to reject all proposals. The district school board shall document the reasons that negotiating terms and conditions with the sole proposer is in the best interest of the school district in lieu of resoliciting proposals;

(d) Commodities or contractual services available only from a single source may be exempted from the competitive solicitation requirement. When a district school board believes that commodities and contractual services are available only from a single source, the district school board shall electronically or otherwise publicly post a description of the commodities or contractual services sought for a period of at least 7 business days. The description must include a request that prospective vendors provide information regarding their ability to supply the commodities or contractual services described. If it is determined in writing by the district school board, after reviewing any information received from prospective vendors, that the commodities or contractual services are available only from a single source, the district school board shall provide notice of its intended decision to enter a single source contract in the manner specified in Section 120.57(3), Florida Statutes, and may negotiate on the best terms and conditions with the single source vendor;

(e) District school boards may dispense with requirements for competitive solicitations for the emergency purchase of commodities or contractual services when the superintendent determines in writing that an immediate danger to the public health, safety, or welfare or other substantial loss to the school district requires emergency action. After the superintendent makes such a written determination, the district school board may proceed with the procurement of commodities or contractual services necessitated by the immediate danger without requesting competitive solicitations. However, such an emergency purchase shall be made by obtaining pricing information from at least two prospective vendors, which must be retained in the contract file, unless the superintendent determines in writing that the time required to obtain pricing information will increase the immediate danger to the public health, safety, or welfare or other substantial loss to the school district;

(f) A contract for commodities and contractual services may be awarded without competitive solicitations if state or federal law, a grant or a state or federal agency contract prescribes with whom the district school board must contract or if the rate of payment is established during the appropriations process;

(g) A contract for regulated utilities or government franchised services may be awarded without competitive solicitations.

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(13) Insofar as practicable, all purchases shall be based on contracts, purchasing card systems, electronic procurements or purchase orders. Within limits prescribed by the district school board, the superintendent shall be authorized to approve purchases under rules of the district school board; provided that in so doing, he or she shall certify that funds to cover the expenditures are authorized by the budget and have not been encumbered.

(14) A district school board, when acquiring, whether by purchase, lease, lease with option to purchase, rental or otherwise, information technology, as defined in Section 282.0041(15), Florida Statutes, may make any acquisition through the competitive solicitation process as described herein or by direct negotiation and contract with a vendor or supplier, as best fits the needs of the school district as determined by the district school board.

(15) Except as otherwise required by statute, a district school board, when purchasing insurance, entering risk management programs, or contracting with third party administrators, may make any such acquisitions through the bid process as described herein or by direct negotiations and contract.

Specific Authority 1001.02(1), 1006.27, 1010.04 FS, Law Implemented: 1006.27, 1001.42(4)(j), 1010.04 FS. History - Amended 12-17-65, 5-24-67, 9-17-72, 4-19-74, 9-19-74. Repromulgated: 12-5-74, Amended: 2-21-77, 3-10-85, Formerly 6A-1.12, Amended 6-27-89, 7-5-90, 6-10-92, 6-29-93, 4-25-96, 4-14-97, 7-17-00, 2-25-09.

**FLORIDA DEPARTMENT OF EDUCATION
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6A-1.013 Pool Purchases -- Two (2) or more districts may jointly pool their requirements and resources and designate one (1) school board, or the Department, to act as agent for all in the requisitioning, bidding, and purchasing of services or commodities. Each district participating in such a pool purchase shall pay its pro rata cost to the district designated as the agent district and each district shall show only the net cost of such purchases in its annual report. The superintendent of the agent district shall in each case furnish each cooperating district a statement certifying that the purchase complied with all applicable laws and rules. If the Department is designated as the agent, purchases shall be made in accordance with the requirements of the Division of Purchasing of the Department of Management Services and such purchases shall be deemed to satisfy the legal requirements of each participating district.

Specific Authority 229.053, 229.79, 237.02(2) FS. Law Implemented 229.79, 230.23(4)(j), 237.02(2) FS. History - New 9-17-72, Repromulgated 12-5-74, Amended 2-21-77, Formerly 6A-1.13.

6A-1.091 Purchases from Internal Funds -- Pursuant to Section 237.02(1)(2)(4), Florida Statutes, and rules of the State Board the requirements pertaining to purchases and securing bids on purchases made from public tax funds by the school board shall be observed when purchases are made from internal funds, except that approval by school board of internal account vouchers for payment is not required unless otherwise specifically provided for by school board rule. The school board may by rule place more strict requirements pertaining to purchases from internal funds than is required by the general or any special law relating to purchases from tax funds. The board may delegate by rule to such individuals as it may deem appropriate the making of such purchases from internal funds and the securing of quotations and awarding of contracts. Insofar as possible, purchases of the same or a similar nature to be used in more than one (1) school should be combined and purchased only after approval by the school board. Purchases made from funds handled in trust for individuals such as purchases of class jewelry, school annuals, cards and invitations, insignias, caps and gowns, etc., shall be exempt from the foregoing requirements relative to purchases; however, all such funds shall be deposited in the internal funds and shall be subject to the regular individual school audit.

Specific Authority 229.053(1), 237.02(4) FS. Law Implemented 237.02(4) FS. History - Amended 2-20-64, 6-20-64, 5-24-67, 8-9-68, Repromulgated 12-5-74, Formerly 6A-1.91.

OPENING OF NEW SCHOOLS (CAPITAL OUTLAY PROJECTS)

Capital Items Vs. Supply Items – Non Capital Items

Capital Outlay Funds (s. 236.25(2), f.s.) may be spent on a new school to purchase equipment that is built, installed or established to serve an educational purpose and which may be lawfully used. Included in capital outlay are furniture and equipment, i.e., desks, science demonstration tables, library tables, library books for the media center, equipment for agricultural shops, appliances for home economics classrooms, or equipment for science labs. Capital outlay funds may not be used to purchase textbooks, classroom supplies, expendable supplies, consumable supplies, or other non-capital outlay items which includes other instructional and/or teaching materials.

One of the items that cannot be purchased out of construction funds is supply items. A supply item is considered any article or material that meets any one or more of the following conditions.

1. It is consumed in use.
2. It loses its original shape or appearance with use.
3. It is expendable, that is, if the article or material is damaged or some of its parts are lost or worn out, it is usually more feasible to replace it with an entirely new unit rather than repair it.
4. It is an inexpensive item, having characteristics of equipment, whose small unit cost makes it inadvisable to capitalize the item.
5. It loses its identity through incorporation into a different or more complex unit or substance.
6. Has a life expectancy of one year or less.

Because of the requirements that prohibit the purchase of supply items from construction funds, we cannot purchase the following items using this funding source: staples, tape, crayons, pencils, pens, paper, garbage bags and liners, and any other items that meet the above criteria.

Ref: Principal's Handbook for Opening A New School (Distributed by Purchasing Department)

Master F&E Lists & Vendor Folders

The master F&E list is a detailed spreadsheet of budget (district) approved furniture and equipment that will be purchased for your school. This document will be the main source of information for the receiving clerk to use when the trucks start arriving with deliveries. It consists of the building and room number (where it will go in the school), an area description (art, music, administration, etc.), an item description of what is being bought, the quantity to be purchased, the unit and total cost, the vendor, and the brand and model number of the item being purchased.

The master list will be used as a reference tool to locate the vendor's purchase order when the receiving clerk is checking in items against packing lists provided by the shipping company at the time the delivery is made. The Purchasing Department will provide manila folders labeled with the vendors name, and/or miscellaneous alpha folders that contain copies of all purchase orders issued for your project so the receiving clerk can easily locate the purchase order needed.

School based personnel are not to contact vendors directly to ask that an item purchased for their school be "swapped out" for a different item, or to ask that a credit be given so they may buy something else from a different vendor for the same amount of money. The Purchasing Department is the only one authorized to modify a district issued capital outlay purchase order.

OPENING OF NEW SCHOOLS (CAPITAL OUTLAY PROJECTS)

Payments to Vendors – Capital Outlay Projects

The Purchasing Department is responsible for seeing that all invoices against PO's issued for the new school project are receipted in SmartStream and paid in a timely manner after delivery and acceptance. No invoice will be paid until Purchasing has received paper work from the school indicating they have received the items and that they are in good condition.

Warranties for Capital Items

Some of the items ordered for your new school will come with a product warranty. Either the warranty is implied, or there may be a warranty card shipped with the product. If it is necessary for a warranty card to be filled out, it is the school's responsibility to complete the information and send it in to the vendor so the item will be registered with the vendor and/or manufacturer. Many vendors now have an on-line registration for warranties for fast and easy filing (be sure to print down a copy if you enter it on-line). It is up to the principal to designate a person to complete this task and to keep the information available at the school for future use.

DO NOT SEND THE WARRANTY CARDS TO THE PURCHASING DEPARTMENT. KEEP THEM AT YOUR SCHOOL FOR FUTURE USE.

Material Handling Equipment

The material handling equipment that will be necessary for receiving shipments and distributing items to classrooms will be ordered by the Purchasing Department prior to the expected beginning delivery dates for the school. The material handling equipment will consist of such things as hand trucks, dollies, and platform trucks. The items may be shipped to the Warehouse & Distribution Department and brought to the site by one of the district warehouse delivery trucks prior to the date the school is ready to begin accepting vendor deliveries.

Your custodian and receiving personnel need to be very careful about lending out this equipment to outside trucking company employees, contractors, and/or sub-contractors that are finishing up the school – you might not get them back. Each school should immediately write their school name on the equipment, so that you can identify your handtrucks from a vendor's, or a contractor's equipment. These items are to be locked up when not in use so that they remain on the premises and are not stolen.

If you have not received these items prior to the established start date, please contact the Purchasing Department so we can follow-up on the delivery of the items.

FINAL STAGE – WALK-THROUGH AND RESOLUTION OF DAMAGED GOODS.

Furniture Walk-Through – After vendors have installed and set in place the classroom and administrative furniture, the Purchasing Department will perform a walk-through by building, by room with the vendor's representative to verify that the furniture has been correctly assembled, is damage free, and that the proper items and quantity have been placed in the designated areas. If during the walk-through there are items that are damaged or unacceptable, the Purchasing Department will contact the vendor to make arrangements for replacement items to be delivered to the school.

OPENING OF NEW SCHOOLS (CAPITAL OUTLAY PROJECTS)

Final Stage – End of Project - Resolution of Damaged Goods

The last phase of furnishing and equipping a new school is to follow-up on all of the dangling items such as returned goods, late deliveries, outstanding invoices, etc. The purchasing clerk will go through the entire master spreadsheet to determine what items have not been delivered and/or paid. If there are any outstanding payments to be made the clerk may contact the school requesting documentation so if the items have been received we can pay the vendor. The school based receiving clerk and the purchasing project manager will work together to determine what is left to do and how to resolve any pending issues.

Remember the time to deal with issues regarding quality problems or other outstanding issues for items received by the school is NOW. Please make sure that your school personnel have checked each piece of equipment to make sure that it works. If you put the items in a closet or on a shelf for months and do not notify us until after the warranty has expired, there is no recourse back to the vendor. Most vendors are very happy to replace defective items that are requested in a timely manner from the date of delivery. However, the vendor's responsibility ends with the expiration of the warranty and/or after a reasonable amount of time.

RENOVATION PROJECTS

The district has two basic types of renovation projects. The first type of project involves improvements to existing classrooms such as replacement of ceiling tiles, new carpet, new floor tile or painting of interior walls. These types of projects do not normally allow for replacement of any furniture or equipment.

The other type of renovation project normally involves the re-use or modification of existing space and/or addition of new buildings to existing campus. Projects where existing cafeterias or media centers are converted to classrooms are such examples. When this type of renovations occurs, funds are usually available to furnish and equip these new rooms. If the classrooms are replacing portables, any furniture in those units must be first looked at to determine if such furniture is suitable for the new classrooms. Normally, if the classroom has a special use, such as an art, science, or music room, the existing equipment in use is moved to the new room. A list of that curriculum's standard equipment may be provided to the principal as a one time opportunity to bring that program up to one that equals the same program if it has been part of a new school opening.

Once the list is approved by the principal, the District Specialist in that subject area will approve, add, or delete certain items, if appropriate. Purchasing will price the final list out and submit it to Budget for funding and final approval.

If Budget cannot fully fund the F&E list, the Area Superintendent may be brought in to ascertain if the items omitted are actually needed or not. If the Area Superintendent feels the request is legitimate, they may take this request to the Instructional Council if it involves significant dollars, or will represent a change in the way the district has funded classes in the past. Normally for purchases under \$5,000.00, the district will approve the purchase on the recommendation of the Area Superintendent.

OPENING OF NEW SCHOOLS (CAPITAL OUTLAY PROJECTS)

NEW SCHOOL CONSTRUCTION COMMODITIES

BUYER, MICHELLE BLACK – EXT. 50863

All Schools:

A/V Equipment
 Administrative Furniture
 Art Equipment
 Bookcases, All Types
 Books, Library/Professional
 Cabinets, File, Lateral, Storage
 Cafeteria Furniture, Equipment & Supplies
 Classroom Furniture
 Clinic Equipment
 Darkroom Equipment
 Flags
 Library Book Barcode System
 Library Supplies
 Maps and Globes
 Marker Boards/Cork Boards/Presentation Centers
 Mats, Entrance
 Media Furniture/Equipment
 Music Instruments & Equipment
 Office Supplies (Warehouse Start-up Items Only)
 Refrigerators
 Science Equipment
 Stage Curtains
 Washers & Dryers

Middle – High Schools:

Agriculture Equipment & Supplies
 Child Care Equipment & Supplies
 Drafting Equipment & Supplies
 Graphic Arts Equipment & Supplies
 Home Economics Equipment & Supplies

BUYER, JACQUETA SCOTT – EXT. 50853

All Schools:

Radios and Pagers
 Tools, Hand/Power
 Lawn Equipment – Motorized
 Office Equipment – Calculators
 Physical Education Equipment
 Playground Equipment
 Sporting & Athletic Equipment
 Custodial Tools and Equipment

BUYER, LAURA DAULTON – EXT. 50841

All Schools:

Clocks
 Computers – Hardware & Software
 Copier Machines
 Fax Machines
 TV/Video Equipment

PROCEDURES FOR REPLACEMENT FURNITURE &
EQUIPMENT ORDERS - Budget Funds

(under review)

REQUEST FOR PUBLIC RECORDS

The Purchasing Department will handle all requests for public records in the following manner:

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

CUSTODIAN OF PUBLIC RECORDS
(386) 734-7190 ext. 20119
Custserv@volusia.k12.fl.us
200 N. Clara Ave., DeLand, FL 32720

1. Custodian of Public Records will forward the public records request to the Coordinator of Purchasing. The public request should be handled in a timely manner.
2. Purchasing will gather the documents and provide copies/CD's of the requested material, along with a cover letter stating the number of pages and/or CD's being provided, to the Coordinator of Purchasing. The information will be forwarded to the Custodian of Public Records for review and approval.
3. If there are no questions regarding the materials provided, the Coordinator of Public Records will forward the information for distribution to the person who made the initial request for the public records.
4. Custodian of Public Records will collect any payments due for the materials being requested, and will ensure that the requester receives the public records in a timely manner.

Revised: 12/2016