

Purchasing Procedures

GENERAL INFORMATION:

Schools/Departments are encouraged to contact the Purchasing Department for assistance with all phases of the procurement of goods and services for the Lafayette Parish School System.

Purchasing Department Contacts:

-S. Lee Francis, Purchasing Agent	337-521-7329
-Larry Breaux, Sr. Purchasing Clerk, (Central Office, Lerosen & VCC)	337-521-7331
-Alysia Gobert, Purchasing Clerk, (Elementary, Middle & High School)	337-521-7330
-Vacant, Part Time Clerk	337-521-7334

The role of the requestor shall include:

- Providing electronic requisition in Alio. (See Alio User Guide Link for assistance)
- Confirming receipt of goods and returning pink signed purchase order to accounts payable as per their instructions
- Authorizing payments to vendors
- Assuring unencumbered budget balances sufficient to fund all purchases
- Recommendation for awarding contracts

When ordering materials and supplies, use vendors with outstanding bids first, then use vendors with state contracts, then use quotes to obtain the best pricing.

PREPARING YOUR REQUISITION:

The purchase requisition is designed to contain all of the necessary information relevant to the processing of the purchase.

Please fill out the requisition completely. Also, make sure that all information on the requisition is accurate.

Please state shipping charges. If there are no shipping charges, it should be noted on the requisition as well as why or who quoted free shipping under special instructions either on PO line or Header line. Otherwise, 10% shipping charge needs to be added to the order and entered as a line item under the items tab. If freight was quoted give name of person and/or quote number or any information as to why this freight was charged. If not quoted the statement should read "Freight (pre-pay and add) See Freight Section for detail.

If you have paper backup document that needs to be attached to a requisition, you will need to write the requisition number on each page, scan the information into a "pdf" format and send in an e-mail to your assigned buyer. If you received your backup document as a PDF in an email you may forward the email to your designated buyer. The requisition number must be in the subject line of your email.

In both of these instances the requisition owner will ONLY "SAVE" the requisition. The assigned buyer will "FINISH" the requisition once the documents have been attached. Finishing

the requisition activates the approval chain. The Buyer will reply to the requestor advising when the attachment has been done.

Try to include all orders for your school or department to one vendor on one requisition. Limit orders for individual teachers or employees.

FREIGHT:

A dollar amount should be entered in the Freight Cost box on the Order Header page. The dollar amount must be entered first prior to entering in items.

No percentage should be entered on the order header page. A note on the order header page under “special instructions” in the “header” box should be entered as follows:

- ‘Shipping quoted by ... Co. rep name’ or ‘Shipping per attached quote’
- ‘Shipping, prepay & add’, this is an estimated dollar amount, 10% of order total
- ‘Shipping per vendor website’

When there are no shipping charges, note on the order header page in the “special instructions” box in the “header” section, or “PO” section, “no shipping charges per (insert sales rep name)”.

When items are ordered from a bid holder or state contract vendor, it is understood that no shipping charges will apply. No notation is needed.

BLANKET PURCHASE ORDERS:

Fixed price contract for the purchase of (state what purchase is for – description) per attached;
Not to exceed \$_____, inclusive of \$_____ shipping (prepay & add)

If there is a discount:

Price reflects _____% discount per _____.

Pick Up PO’s from Pre-Approved Vendors

In the header section: _____ HAS APPROVAL TO PICK UP. Purchaser’s name, driver’s license number and school/department MUST appear on invoice.

Types of Blankets

- Time & Material, Labor-Hour, Letter Contract (need certificate of insurance)
Covers:
 - Blanket repairs, Service or Maintenance (Contracted Services)
 - Services such as Architecture, Engineering
- Indefinite Deliver
Covers:
 - General Descriptive
 - Book Fairs

The terms and conditions stated with the Purchasing Procedures manual primarily addressed the Indefinite Delivery or General Descriptive Type blanket purchase orders.

PURCHASE ORDER FOLLOW-UP:

It is the responsibility of the requestor to follow-up on all overdue or back orders.

RUSH PURCHASES:

When the need arises for an immediate purchase, the person needs to check the approval chain and make calls to get the requisition approved by all approvers until you contact purchasing agent and the PA will then advise staff of URGENT PO. Please remember that not every requisition can be nor should it be URGENT. Also, please remember to check with the vendor of choice for the cost of rush freight, as these amounts are usually higher.

ONLINE PRICING:

All orders from Staples, Unity Education, School Specialty/Beckley-Cardy, and Office Depot must have been processed online from their website to key in correct dollar amounts and information into your requisition. Please visit the Purchasing Department's website for instructions on obtaining online pricing.

OUTSTANDING BID HOLDERS:

Please visit the Purchasing Department's website for a complete list of our outstanding catalog bid holders.

SOLE SOURCE PURCHASES:

Schools/departments wanting to purchase materials/supplies from a Sole Source vendor must complete a Sole Source Purchase Justification Form. Copy and paste this link for access to the form: <http://www1.lpssonline.com/site368.php>

CHECK REQUESTS:

Schools and departments using check requests for purchases or reimbursements for purchases of materials and supplies must comply with the state purchasing law and school system policies and procedures. Bid holders and state contract vendors must be used when possible. Furthermore, check requests should only be used for the procurement of emergency supplies, services, and items which cannot be purchased with a purchase order. All other purchases should be made using the requisition process. When making purchases with a check request, please explain in the appropriate section on the check request form why the requisition process was not used.

Check requests for reimbursements, both individual and Student Activity Funds, will not be approved if the reimbursement does not follow the purchasing procedures detailed above. Also, check requests for payments to vendors for the purchase of materials and supplies will not be approved unless there is a proper explanation as to why the requisition process was not used.

Check requests for reimbursements must be submitted within 60 days of the expenditure.

STUDENT ACTIVITY FUNDS:

Schools using Student Activity Funds to purchase materials and supplies must comply with the state purchasing law and school system policies and procedures. Schools must use bid holders or state contracts when making purchases for commodities which are on bid or state contract. When

schools need to make a purchase for an item that is not on bid or state contract, competitive pricing must be obtained when required by law.

COPIER PURCHASE PLAN:

- 1 NO ONE below the level of Superintendent is authorized to bind LPSS to debt, such as a LEASE agreement. Any lease agreements are to be sent to Central Office – ATTN: Lee Francis, Purchasing Agent.
- 2 Requests to purchase copiers are to be directed to Judy Vincent, Central Office. NOTE: Purchase minimum of \$3,000.00 on Purchase Option Agreements.
- 3 Funding source that will be reimbursing General Fund and where equipment will be located is required before Purchase Option Agreement is drawn up.
- 4 The account number used to reimburse General fund depends on who will be using the machine and this number must be included on Agreement along with signature. Note if: Administrative: Code to Office Supplies Instructional: Code to Material & Supplies
- 5 Agreements will be routed & signed by hand – Not electronically. Requisition will be created by Judy Vincent and attachments will electronically forward to Purchasing. Once Purchasing has attached the PDF paperwork & finished the Requisition, the Requisition will then be in the approval chain.
- 6 All Purchase Option equipment is required to be tagged and submit a Fixed Asset Addition form. Items valued at \$5,000.00 and above should be tagged with a **“Yellow”** LPSS tag and those below \$5,000.00 should be tagged with a **“Silver”** LPSS tag.

LEASE & MAINTENANCE AGREEMENTS:

All lease and maintenance agreements must be issued using the requisition and purchase order process.

Lease agreements – Requisitions for lease agreements need to be issued for the same terms as the billing terms. If the billing terms are monthly, the requisition should be issued for monthly payments. If the billing terms are annual, the requisition should be issued for one annual payment. Attach original lease agreement(s) for new lease(s) or a copy of lease agreement(s) for renewal(s) to requisition and include serial number(s) on requisition form. Please indicate lease-end date or year of lease on requisition (year 2 of 4 year lease).

In order to ensure that all schools’ and departments’ leases comply with state law, all lease agreements must be submitted to Purchasing before being processed. All lease agreements must be signed by the Superintendent or the Chief Financial Officer. Once the terms of the agreement have been approved by the Superintendent or Chief Financial Officer, the agreement will be sent back to the school or department so a requisition can be completed and submitted to Purchasing.

New account numbers for lease agreements – For proper accounting purposes, schools and departments will have new account numbers for lease agreements. These new account numbers

will be set-up once the lease agreement is approved by the Superintendent or Chief Financial Officer. The Purchasing Agent will notify school or department of the account numbers and a budget transfer will need to be submitted to Accounting. Then, a requisition will need to be submitted to Purchasing. Schools and departments will need to ensure that funds are budgeted in these new accounts in subsequent years.

Maintenance agreements – Requisitions for maintenance agreements can be issued for either monthly or annual payments. Annual payments are preferred. You should check with your vendor. Attach original maintenance agreement(s) to requisition and include serial number(s) on requisition form. Annual Agreements must begin on July 1 and end on June 30 of the following year. You cannot have an agreement that begins in one fiscal year and end in another. If you begin an agreement in the middle of the year you must have the vendor pro-rate the agreement to end on June 30.

SPENDING GUIDELINES:

Spending of your budget dollars should be done in the year and spent on the students the funds are intended for. Therefore we are requesting that the following spending guidelines be adhered to:

- A. All grants must spend at least 75% of their budgets before December 31st of each year. Those grants which may have late approvals should have requisitions prepared in advance so that requisitions can be forwarded immediately once approval is granted. Please get with the grant accountant or supervisor.
- B. Non-grant funds are encouraged to spend early and on a timely basis. Failure to do so could result in having to prepare an explanation and provide a spending plan.

Failure to comply with the above could result in a loss of funds.

STATE CONTRACTS:

Schools/departments may use state contracts to purchase items that are not on bid. To see if the items you wish to order are on state contract, please visit the State Purchasing web page: <http://www.doa.louisiana.gov/osp/osp.htm>

If you are ordering items that are on state contract, please list the state contract information on your requisition.

COPIER STATE CONTRACTS:

	B/W	COLOR
Canon	# 409541	
Konica Minolta	# 409158	# 409168
Kyocera	# 409543	# 409867
OCE	# 407948	# 407961
Sharp	# 409160	# 409170
Toshiba	# 409542	# 409546
Xerox	# 409545	# 409547