

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:

- Kay Ledet, Purchasing Agent, 521-7329
- Sandra Compton, Elementary & Middle Schools, 521-7331
- Pat Wooters, High Schools & Central Office, 521-7330

The role of the requestor shall include:

- Providing written specifications
- Confirming receipt of goods
- 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 and signatures relevant to the processing of the purchase.

Please fill out the requisition completely. Also, make sure that all information on the requisition is accurate and that funds are available from the account.

Please state shipping charges. If there are no shipping charges, note that on the requisition. Otherwise, purchasing will add a 10% shipping charge to the order.

In the justification section, at least one of the justifications listed must be checked. If the justification requires an explanation, you may type it on the requisition or attach a separate page.

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

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 completed requisition is to be hand delivered to the Purchasing Department marked URGENT. Every effort will be made to minimize the time it takes to process these requisitions. Please remember that not every

requisition can be marked 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 Corporate Express, Unity Education, School Specialty/Beckley-Cardy, and Office Depot must have an online price sheet attached to the 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.

PREVIEW ORDERS:

Schools/departments ordering materials/supplies on a "preview" basis need to complete a requisition form noting that the order is for "preview only" and submit it to the Purchasing Department. If the school/department decides to keep the order, they must notify the Purchasing Department so that a revision can be made to the purchase order.

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.

LEASE & MAINTENANCE AGREEMENTS:

All lease and maintenance agreements must be issued using the requisition and purchase order process. Requisitions need to be submitted before the end of the school year. Requisitions will be tracked and schools and departments that do not submit their requisitions on time will be responsible for any late charges or fees.

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. Attach original maintenance agreement(s) to requisition and include serial number(s) on requisition form.

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:

Canon	SC # 407501
Konica Minolta	SC # 407504
Kyocera	SC # 407503
Lexmark	SC # 407506
Sharp	SC # 407502
Toshiba	SC # 407505
Xerox	SC # 407500