

KANSAS CITY

PUBLIC SCHOOLS



PURCHASING PROCEDURES

Updated February 2019

PURCHASING TEAM

- Larry Weissman - Purchasing Manager
- Ashlea Blue - Senior Contract & MBE/WBE Specialist
- LaVera Snipes - Senior Procurement Specialist
- Connie Fuimaono - Procurement Operations Specialist
- Kim Mason - Procurement/Supplier Diversity Specialist
- Karen Rollins - Warehouse Worker/Driver
- Tyrone Hunter - Delivery Associate

VENDOR REGISTRATION INSTRUCTIONS

Process for New Vendors and Inactive Vendors

All requests for vendor activations must be made internally by a KCPS end user. All requests must be submitted to vendorregistration@kcpublicschools.org with the Vendor Activation Request Form and the Vendor Application.

Any request for materials, goods or services by a KCPS end user with the appropriate completed documentation will be completed within two (2) business days.

Once a vendor is activated the end user will receive an email from vendorregistration@kcpublicschools.org with the vendor's name and vendor number.

Vendor Forms

All current up to date vendor registration forms (please see form names on the right) can be located at:

<http://kcpublicschools.org/Page/211>

These forms are restricted to staff only. Staff must login to access these forms.

You will need the following forms for new Vendor Registration:

- *Vendor Activation Request Form
- *Vendor Application

Vendor Registration Approvals

Questions regarding a vendors registration can call (816)418-7926 or send an email to vendorregistration@kcpublicschools.org

Purchasing is available to answer any questions Monday-Friday between the hours of 8:00 am - 5:00 pm.

Please call (816)418-7300.

Vendor Application



Dear Partner:

Thank you for permitting Kansas City Public Schools to procure your goods and/or services. We hope to build a long-term, mutually beneficial business relationship with you.

If you desire to do business with Kansas City Public Schools, you must complete the vendor registration packet in its entirety and return to the KCPS employee requesting your goods and/or services.

Elements of a Successful Vendor Application

Completed Vendor Application
Completed Vendor ACH Application
Completed W9 Form (publication date of October 2018)

All vendors are required to comply with any applicable Federal, State, and local laws, rules, regulations, ordinances, and directives, and all provisions required thereby to be an approved vendor and are hereby incorporated herein by reference.

Kansas City Public Schools appreciates the consideration and the opportunity to connect with you.

Regards,
Purchasing
Kansas City Public Schools
(816)418-7300

Vendor Application



KANSAS CITY PUBLIC SCHOOLS
VENDOR ACH APPLICATION
 (Revised 3-2019)

Section A: Vendor Information		
Description of Request: <input type="checkbox"/> New <input type="checkbox"/> Change <input type="checkbox"/> Cancel	Taxpayer ID Type: <input type="checkbox"/> ID/TIN <input type="checkbox"/> SSN	
Vendor Name:		
Address:		
City:	State:	Zip Code:
Taxpayer ID Number:		
Contact Name:	Title:	
Business Phone:	Business Fax:	
E-Mail Address:		
Section B: Financial Institution Information		
Financial Institution Name:		
Financial Institution Phone:		
Address:		
City:	State:	Zip Code:
Depositor Routing Number:		
Depositor Account Number:		
Account Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
Section C: Financial Institution Certification		
I certify that the above depositor routing number and account number to be true and accurate for the vendor shown in Section A.		
Printed Name and Title:		
Signature:		Date:
Section D: Vendor Authorization		
<input checked="" type="checkbox"/> Vendor hereby authorized the School District of Kansas City, Missouri to initiate credit entries to the financial institution and account named in Section B, and to credit the same such account. Vendor acknowledges that the origination of ACH transitions to this account must comply with the provisions of U.S. law. This authorization is to remain in full force and effect until the School District of Kansas City, Missouri has received written notification from Vendor of its termination in such time and in such manner as to afford the School District of Kansas City, Missouri and the Financial Institution a reasonable opportunity to respond to such a request.		
<input type="checkbox"/> Vendor hereby DECLINES this ACH <input type="checkbox"/> Vendor hereby ACCEPTS this ACH		
Printed Name and Title:		
Signature:		Date:

Vendor Activation Request Form

Assigned Vendor No. _____

Vendor Activation Request Form

Date: _____ Activation Request: (New Activation) (Re-Activation) (Update)

Department/ Location Requesting Vendor: _____

KCPS Contact Person: _____ Ext. No. _____

Vendor Name: _____

Description of goods/materials/supplies or services to be provided: _____

INTERNAL USE ONLY

Accounting Recommendation for Federal Tab: _____

Accounting Recommendation Confirmed by: _____

Assigned Vendor Number: _____

Vendor Activated On: _____ By: _____

Last Updated March 2019

REQUISITION PROCESS

Requisition Process

- Requisition is entered in Alio
 - Contract field must be entered on all orders
 - If you have a Board Item Number, it must be entered in the appropriate field
 - If the vendor references a quote number, enter it in the header field
 - Write requisition number on quote document before sending to Purchasing
- Person entering the requisition must email requisition documents (quotes, board docs, etc.) to their Procurement Specialist

Requisition Process

- Procurement Specialist receives requisition documents
 - Procurement Specialist prints Alio requisition document
 - Procurement Specialist verifies that if the requisition exceeds \$3,500 that there are three (3) quotes attached or a Sole Source document. If not, the Procurement Specialist contacts the person that entered the requisition to have the required documentation forwarded
 - Procurement Specialist attaches documentation to the requisition

- **NOTE**
 - Receiving the good or service before a valid purchase order is established is a violation of the Purchasing Policy

Requisition Process

- Alio Approval Process
 - Only employees of KCPS have authority to authorize expenditures or approve requisitions
 - Approval or signature authority does not permit individuals to sign Agreements or Contracts. **Only the Superintendent and Board Chair are authorized to sign.**
 - If you have any questions, please contact Purchasing at 418-7300

Requisition Process

- Current KCPS authorization levels are as follows:
 - <\$5,000 Manager/Coordinator
 - <\$5,000 Principal
 - \$5,001 - \$10,000 Director
 - \$10,001 - \$20,000 Executive Director
 - \$10,001 - \$25,000 Assistant Superintendent
 - \$10,001 - \$25,000 Associate Superintendent
 - \$10,001 - \$25,000 Deputy Superintendent
 - \$10,001 - \$25,000 Chief Officers
 - \$25,001 - \$250,000 Superintendent
 - >\$250,001 Board of Education

PURCHASING CONTRACTS & SERVICE AGREEMENTS

Contract & Service Agreement Form (previously referred to as P&C Form)

- The form can be found online at:
<https://goo.gl/forms/SsDUeLJSxMmnKnG73>
- You must sign in to your KCMSD Gmail account as staff to complete the online form and upload any associated scope of work, contract or other relevant details to be considered

**The process for all Contracts and Service Agreements
starts in Purchasing**

Contract & Service Agreements

Request for Review and/or Recommendation

In order to have any **agreement** processed for signature by KCPS that was not formally bid you must have approval by the Senior Contract Specialist or Purchasing Manager. The Purchasing Department will confer with Legal Department on all contracts and service agreements.

In order to move forward with any **formal bid, services, software licenses or subscriptions** you must have approval by the Senior Contract Specialist or Purchasing Manager.

The Contract & Service Agreement form must be submitted online by following this link: <https://goo.gl/forms/SsDUeLJSxMmnKnG73>

FORMAL BID PROCESS

Purchasing Guidelines

Contracts and Service Agreements

- **The only persons authorized to sign any KCPS Contracts, MOU and Service Agreements is the Superintendent and the Board Chair.**
- All Service Agreements, MOU and Contracts must be reviewed by the Senior Contract Specialist, to ensure contract and Purchasing compliance prior to receiving signatures from either the vendor or KCPS authorized personnel.
- All Information Technology (IT) requests must go through the IT Department.
- All transportation requests must go through the Transportation Department.
- Vendor Complaint System is now accessible on-line under Quick Links on the KCPS Purchasing webpage.
- Requisitions less than \$3,500 require a minimum of one quote.
- Requisitions \$3,500 – \$24,999 require a minimum of three quotes, unless the Vendor is a Sole Source. In this case, the Sole Source Justification Form must be included.
- Requisitions > \$25,000 require a formal bid process (\$15,000 for construction).

FORMAL BID PROCESS

- End-user submits Contract & Service Agreement online form to the Senior Contract Specialist or Purchasing Manager
- Procurement Specialist receives bidding recommendation and scope of work from the Purchasing Manager
- Procurement Specialist contacts end-user to verify details of bid including:
 - Scope of Work
 - Identify dates for Bid Posting, Questions, Answers, Bid Opening, Pre-bid Meeting and Site Visit, if required
 - End-user should suggest Vendors to be invited to submit bid
- Create the Invitation for Bid (IFB), Request for Proposal (RFP), or Request for Qualifications (RFQ)
- Purchasing Manager, Procurement Specialist and end user review and provide approval to post bid

FORMAL BID PROCESS

- Advertisement
 - Formal bids/proposals are advertised in the local Diversity Newspapers
 - If this is a Construction Project, advertisement is also posted in the Kansas City Star
- Post documents on KCPS e-Bid System (IonWave - online bidding tool)
 - Bid invitations will be sent to Vendors selected in IonWave
 - Ensure that any new Vendors are also added at this time

FORMAL BID PROCESS

- Public Bid Opening
 - All bids will be publicly opened on the specified date and time
 - The sealed bids are opened and the pricing is read aloud
 - No bids are accepted after the posted time and date of the bid opening

FORMAL BID PROCESS

- RFP's & RFQ's require an additional meeting for the Evaluation Committee to review the proposals received
 - Ensure that an Evaluation Committee has been selected
 - Provide an Evaluation Matrix to the end-user
 - Hold a bid evaluation meeting with the end-user and selected evaluation committee
 - Purchasing does not evaluate the bids, they are there to ensure integrity and compliance to the process

FORMAL BID PROCESS

- Contract recommendation
 - Procurement Specialist receives bid recommendation from the end-user that includes the Not-To-Exceed total dollar value of the contract.

Final Comments

- **Vendors cannot provide your scope of work and also submit a bid.**
- Once bids close, there cannot be any changes to the vendors submittal.
- There is to be NO CONTACT with the Vendors during the bid process, except by the Purchasing Department.

CONTRACT MANAGEMENT

Contract Process

- The process taken when a formal bid has been issued by Kansas City Public Schools.
- Procurement Specialist provides Bid Recommendation from end-user to Senior Contract Specialist.
- Senior Contract Specialist reviews the recommendation and the bid to ensure compliance with all standards, policies and regulations adopted by KCPS.
- Contract drafted by Senior Contract Specialist, approved by Legal and sent to Vendor.
- Once the Vendor signs the agreement the contract is processed internally by the Senior Contract Specialist for appropriate KCPS signature. KCPS only has two approved signing designees: The Superintendent <\$250,000 and Board Chair >\$250,000.
- Once the agreement is signed by appropriate KCPS designee, the Senior Contract Specialist will return the fully executed agreement to the Vendor and all applicable end-users.
- **All fully executed Contracts must be prepared for Board Item Review.**

SERVICE AGREEMENT AND MEMORANDUM OF UNDERSTANDING (MOU) PROCESS

Service Agreement & MOU Process

An alternate method to use for any professional service or unique opportunity

- Contract & Service Agreement online form completed and appropriate scope/proposal and contact information turned in to Senior Contract Specialist or Purchasing Manager
- Service Agreement or MOU drafted and negotiated and reviewed by Legal prior to being sent to Vendor for review and execution
- Once the Vendor signs the agreement the it is processed internally for appropriate KCPS signature by the Senior Contract Specialist. KCPS only has two approved signing designees: The Superintendent <\$250,000 and Board Chair >\$250,000
- Once the agreement is signed by appropriate KCPS designee, the Senior Contract Specialist will return the fully executed agreement to the Vendor and all applicable end-users
- **All fully executed Service Agreements and MOU must be prepared for Board Item Review**

Vendor Management

- Complaint Link
- Quarterly Meetings

If you're experiencing any issues that is of disruption, loss, inconvenience or unacceptable behavior with a vendor. Please log your issue at the following link:
<https://goo.gl/forms/gTSOSH1ISyKaPgDA2>

Your complaint will reviewed, and if further action is needed Purchasing will get in contact with you. KCPS strives to manage vendors and maintain partnerships, and this involves quarterly meetings to discuss any issues and/or concerns that we as a District have with the vendor.

KCPS relies on information being communicated clearly, and by using the complaint link you're enabling us to monitor and control our vendors.

MINORITY BUSINESS ENTERPRISES
(MBE)

&

WOMEN-OWNED BUSINESS ENTERPRISES
(WBE)

Minority Business Enterprises & Women-Owned Business Enterprises

KCPS is committed to increasing opportunities for MBE / WBE suppliers and enhancing the competitiveness of the supply base.

- **Minority Business Enterprise (MBE)** – A business enterprise that is at least 51 percent owned and controlled by individuals of African American, Hispanic, Native American or Asian descent. The business owner(s) must be a U.S. citizen. The business must receive minority certification from a third-party certifier such as the city, state or regional minority business council.
- **Women Business Enterprise (WBE)** – A business enterprise that is at least 51 percent owned, operated and controlled by a woman who is a U.S. citizen. “Control” in this context means exercising the power to make policy decisions. “Operate” in this context means being actively involved in the day-to-day management. The business must receive certification from a third-party certifier such as the city, state or regional women’s business council.

1st and 2nd Tier Supplier Diversity Opportunities

- 1st Tier Diverse Spend opportunities as a Prime Vendor to KCPS
- 2nd Tier Diverse Spend opportunities with KCPS's Prime Vendors
 - RFP Requirement - Prime Vendors submit 2nd Tier (subcontracting) opportunities during the bid process
 - Contract Requirement- Prime Vendors report 2nd Tier actual diverse spend on a quarterly basis to KCPS

KCPS Annual MBE / WBE Goals

- MBE 9.8%
- WBE 8.5%
- Combined annual goal of 18.3% of the applicable district spend

KANSAS CITY

PUBLIC SCHOOLS



QUESTIONS?