



Lee's Summit School District Annual Program Evaluation Board Policy IM

Program: Purchasing and Distribution Services

Department: Purchasing and Distribution Services

Person Responsible: [Christa Battaglia](#)

Program Design

Program Overview:

Our mission is simple. Purchasing strives to provide exceptional customer service for all students, staff, and community by ensuring district BOE policies are in compliance for all bids, proposals, contracts, and agreements and by obtaining the best value possible on all goods and services. Distribution strives to deliver quality products and services in a timely and efficient manner to all district buildings.

Our core values are:

- Improving processes to facilitate the ease of procurement
- Streamlining the contract review process
- Understanding and responding to our customers' needs
- Being transparent, fair, and consistent in all of our practices
- Retaining the integrity and confidentiality of district data
- Continuing to be a leader in innovation

Strategic Alignment:

We Connect to School Board Priorities and CSIP by:

- Ensuring Board policies are followed by bidding items/projects promptly to ensure the best products and values are chosen
- Utilizing centralized purchasing strategies and cooperative contracts to increase buying power and reduce costs
- Sharing information with the community and all potential vendors by posting bids, RFPs, and Board-approved contracts on ION Wave and on our district website
- Working with Facilities and a committee of district staff to establish a furniture standards team. This team continues to explore and recommend the use of innovative learning environments, including flexible furniture and instructional equipment that encourage collaboration in the classroom



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Financial Implication:

Purchasing and Distribution Services (P&D) strives to save as much money as possible for the district in our everyday operations.

For the past two years, Purchasing & Distribution has been slowly updating our fleet of vehicles, which has allowed us to save on costly repairs to some of the old equipment that was sold on GovDeals. Our fleet is much more efficient and was purchased using the Joint Vehicle Bid that is sponsored by the Mid-America Chapter of Public Purchasing. On average, purchases made from this contract have saved the district at least 20% off the sticker price.

Purchasing looks for new and inventive ways to combine purchases that all or several buildings are using and bids them out. This saves district funds and combines buying power, which lowers pricing for all. To date, our inventory totals \$2,592,902.17. Of that number, P&D inventory is \$941,064.21, and Nutrition Services inventory is \$1,651,841.96.

We are fortunate to have a limited amount of extra space at 505 Transport Dr. that allows us to store surplus furniture until we can find a new home and repurpose it or sell it on GovDeals. The value of surplus inventory that was redirected back to the buildings this past year was \$64,825.

Even during COVID, we managed to recycle 6,983 fluorescent lights & bulbs and 23 cardboard bales. We have also recycled 23 pallets of deselected library books that were not able to go into our bookmobile.

The district has received over \$1 million in surplus sales with GovDeals since the implementation in 2009. In FY 20, the district earned \$89,900 in commissions from the beverage and vending machines.

Annual Evaluation

Stakeholder and Planning Process:

District inventory is broken down into categories such as custodial, office, art, health, PE, perishable and nonperishable food items. Purchasing and Distribution work with each stakeholder (department director or program coordinator) to establish standard inventory items that will benefit students and staff that utilize the items. Before a bid for inventory is put out, we make sure that we have checked the list of items with those in charge of the areas and that we go through that list to ensure that what we stock is valuable and useful to that department. If we agree that an item is not useful, then it is removed from inventory, and a substitute item is put in its place, if necessary. Once bid results are received, the stakeholders are invited to be part of



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the evaluation process. This assures that we have the right product, the right vendor, and the right price.

Weekly managers meetings are conducted and have provided an open line of communication between the disciplines of Purchasing and Distribution. Each member provides detailed information regarding any challenges, questions or celebrations in their area. This team provides feedback, helps other areas with suggestions, and keeps the communication going for the good of the department.

We also focus on our staff and what they bring to the table. Last year, we added a Site Team so that all staff can provide feedback or ask questions and then have their representatives bring the information to our quarterly meetings. This group is composed of a representative from the drivers, purchasing specialists, and inventory specialists. This team meeting has proved to be successful in boosting morale and has given us a number of good ideas to work smarter. It has also given them a voice to be heard. The members run the meeting and are able to bring their concerns and/or suggestions right to the Purchasing and Distribution Coordinator to be addressed. Their ideas/feedback are valued and are an integral part of what we do. If there is a more efficient or better way to do a task, we want to be sure and explore that with those that are doing the tasks.

Annual Program Goals and Action Steps:

Goal I: Purchasing is involved in the day to day operations of the district by working with staff on RFPs, bids and fielding questions regarding purchasing guidelines. Our goal is to make all of these processes much more efficient and user-friendly. This year, we started accomplishing this by:

- Changing Board policy DGA (changed Ratify list from under \$5,000 to under \$15,000)
- Redefining and revising DJF-AP1 (worked with legal to streamline and simplify written procedures)
- Revising Purchasing Policies to mirror both Board policies

Goal II: Implement a comprehensive vehicle and equipment replacement schedule for Distribution Services

- Create a spreadsheet of all vehicles and equipment currently operated by Distribution Services
- Worked with the Shop Supervisor to determine the life of the current fleet
- Utilized the joint vehicle bid for replacement of vehicles and bid other equipment as needed

Goal III: Combined both the Exclusive Beverage and the Snack Vending Machines RFPs into one RFP to leverage buying power for the entire district.



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- Removed the exclusivity of beverage brands from the RFP, which will allow departments to buy water from other sources that run sales and will also allow Nutrition Services to offer a wider variety of drink merchandise to the students
- Allows Athletics to rely on a much more stable source of income for their programs due to fluctuation in sales
- Provides one source of billing that will assist Business Services

Goal IV: Provide district students and staff with appropriate Personal protective equipment (PPE) during COVID pandemic, so they were able to return to in-person learning.

- Work with district lead nurse, risk manager, administration, CDC, and Jackson County Health Department to specify items needed for the safety of our students and staff
 - Seek quotes and bids for quality supplies that were recommended
 - Provided and delivered COVID supply kits for each building
 - Created a separate tracking system for all purchases of COVID supplies needed. This allowed staff to provide information for reimbursement of federal funds
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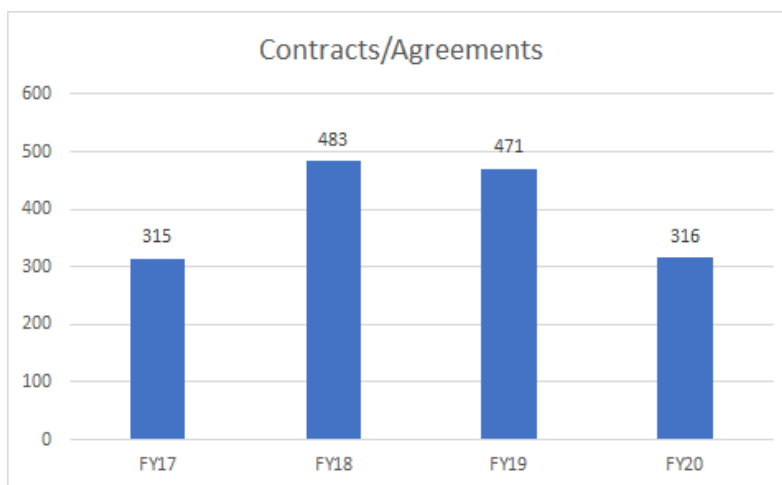
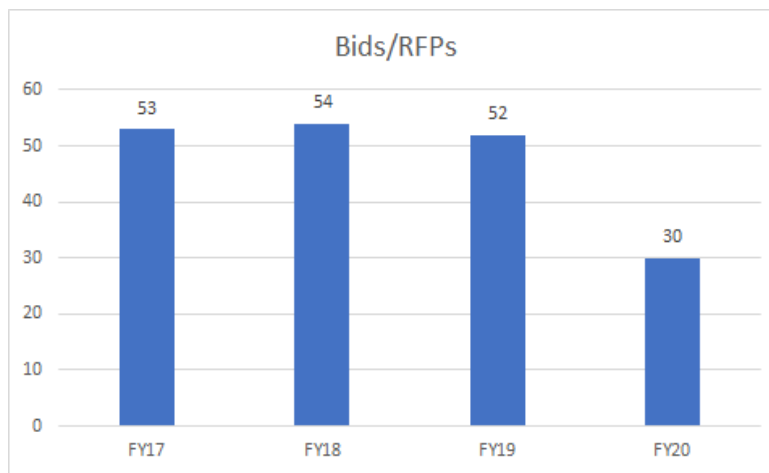


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Goal Results

Associated Data and Evidence of Effectiveness:

Goal I: The two charts below reflect the number of contracts and bids/RFPs that were processed. The data does not reflect the change on contracts from \$5,000 to \$15,000 yet because it was approved in February 2021. This change should streamline the process for staff moving forward.



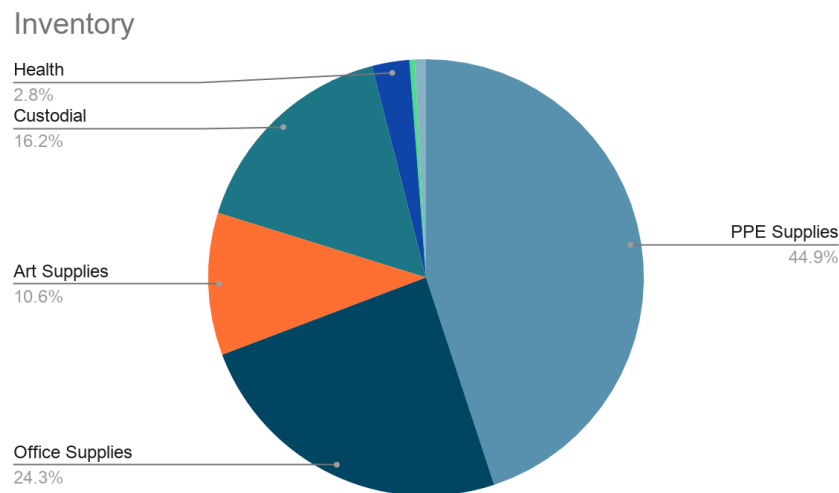
Goal II: A spreadsheet has been created to keep track of the distribution fleet replacement schedule. We will continue to monitor the fleet and work with Transportation as replacements are needed.



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Goal III: The recommendation for the award of the Beverage and Snack RFP is coming this month to the Board for approval.

Goal IV: The pie chart below reflects the number of items that were sourced and added to our inventory for COVID PPE supplies compared to the other inventory categories we stocked. This does not reflect the other items purchased that were not added to stock, such as plexiglass, google face shields, free-standing partitions. At times, this sourcing was the most challenging thing our staff had ever done so far, and the chart indicates that it is now the majority of our inventory.



Findings and Reflection

Strengths and Celebrations:

During this past year of COVID, our staff did an outstanding job of sourcing and finding PPE supplies when there were minimal supplies. Especially in the beginning, schools took a back seat to government agencies and first responders. They worked tirelessly with the lead nurse, risk manager, and other various departments to ensure that we had everything we needed by May/June of 2020. We also had a tracking system in place to keep all PPE orders separate from other inventory for reimbursement purposes. Distribution had everything distributed in order to open our buildings and to keep them running smoothly and safely. PPE supplies have evolved quite a bit over the past year, and our team has done a great job of pivoting when needed to make adjustments in our inventory supplies.



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We worked with the Board to increase contract thresholds so that they were aligned with our Purchasing Procedures. This helped staff by decreasing the number of board packets they submitted as well as streamlining the process which is increasing productivity.

Purchasing staff is utilizing the e-procurement bidding system to post all bids/RFPs in order to gain a larger pool of vendors for responses. This system also helps staff track all effective dates of contracts and allows staff to process renewals electronically. Staff reviewed 316 contracts and agreements this past year for the Board of Education to approve.

Distribution Services staff is always willing to assist with school and community events by providing labor, tables, chairs, and staging for several events such as The Heart of the Summit race, Oktoberfest, Mayor's Christmas Tree Lighting ceremony, PTA events, Candlelighting, testing, and concerts. During COVID, their focus was shifted to assisting Nutrition Services with non-inventory meal items such as milk, sandwiches, fruit cups, and snacks for curbside service and delivering them in a timely manner to the designated locations. They processed 4,872 inventory orders this past year. Staff also collects the mail from each building and delivers food to each cafeteria. They pick up any surplus items that may need to be collected from the buildings to help them free up space. If staff finds a new home elsewhere in the district for surplus items, distribution staff delivers it to the new location. Anytime there is a wrestling tournament that requires mats to be moved from one building to the next, our staff is responsible for moving them. Four drivers processed 1,779 help tickets in the past year.

Over \$2.5M of inventory was maintained by our department in 2020.

March is National Purchasing Month!

Opportunities for Improvement:

- Look for additional services that can be bid out for district-wide use
- Improve the store's inventory catalog by making sure all items have an updated picture and price listed
- Look for additional services that distribution can offer to buildings in order to support student programs
- Audit archive records during relocation this summer and only store what is truly required to be stored, per State Statutes and DESE

Program Refinement



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Upcoming Evaluation Question(s):

How do we continue to put in safeguards for purchasing procedures?

How do we effectively store and safeguard records so that it is efficient and accessible?

How do we monitor and track our current and future FF&E so that we avoid duplication and fully utilize what we have before buying new?

How do we improve inventory management in order to make it useful to all staff and students?

Upcoming Program Goals and Action Steps:

Internal audit-analysis of current items stocked in the Distribution Center

- This June, during our year-end inventory, the Distribution team will conduct an internal audit in order to identify if all items stocked are still appropriate and used throughout the district.
- This will help us identify and free up additional space for new items and to clean out old items that aren't used anymore. It will also assist the Purchasing Specialist in narrowing down the inventory list, thus helping to insure better inventory and pricing.
- We will also compare district inventory to our Amazon history of purchases in order to discuss whether some of our categories of inventory are still feasible or if Amazon is a better source for some items. For example, office supplies. This project will take several months to complete.

Create a Furniture standard catalog for the entire District to utilize when making future furniture selections

- Create an online list of furniture, by category, with pictures and competitively bid pricing for all to select from. It will streamline the purchasing process by pre-bidding and pre-approved the items
- This list and pricing will be kept up to date by the Purchasing department
- The committee will be convened at least annually to review any new requests made to determine if they are appropriate to add to the list
- By creating a standard, the district will be able to leverage greater buying power for not just large bond projects, but for the day-to-day purchases as well. Furniture will be standardized so that the same items can be used or relocated to many different areas throughout the entire district

During this fiscal year, Purchasing is developing and posting several large district-wide bids/RFPs that include the following:

- Comprehensive Legal Services



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- Annual Auditing Services
- Commercial Insurance
- Facilitator Services for Team Lee's Summit
- Student Wellness Center
- Integrated Pest Management