PURCHASING TEAM

Ashlea Blue - Purchasing Manager
LaVera Snipes - Senior Contract & MBE/WBE Specialist
Tyson Malone - 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:

https://www.kcpublicschools.org/staff-portal/employee-forms

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 Application
* Vendor Activation Request Form
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.
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 APPLICATION**

(Revised 3-2019)

**PLEASE COMPLETE INFORMATION BELOW**

<table>
<thead>
<tr>
<th>LEGAL BUSINESS NAME:</th>
<th>(Company must match Federal Tax ID (EIN) or Individual must match SSN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE OF BUSINESS:</td>
<td>(Check below any that apply)</td>
</tr>
<tr>
<td>Service(s)</td>
<td>Construction</td>
</tr>
<tr>
<td>Goods</td>
<td>Other</td>
</tr>
</tbody>
</table>

**US Federal Tax ID (EIN) Number or SSN**

The respondent certifies to the best of its knowledge and belief that it and its principals regarding Department and Subdivision, please initial each of the following statement:

A. Are not presently delinquent, suspended, proposed for delinquent, declared ineligible, voluntarily excluded from covered transactions by any federal department or agency?

B. Have not within a three-year period preceding this proposal been convicted of fraud or a crime involving moral turpitude?

C. Have not within a three-year period preceding this proposal been convicted of a violation of a federal, state, or local tax law?

D. Have not within a three-year period preceding this proposal been convicted of a violation of any law or regulation, or any rule or standard of conduct which is intended to promote or maintain honesty and fair dealing in any local transaction or contract under a public transaction, violation of federal or state antitrust statute or commission of embezzlement, theft, forgery, bribery, facilitation or concealment of records, making false statements, or receiving stolen property?

E. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with conviction of any of the offenses mentioned in paragraph (b) of this certification, and

F. Have not within a three-year period preceding this application/proposal had one or more public transactions (federal, state, or local) terminated for cause of default?

G. Certificate that no employee who will enter school buildings or potentially have contact with school students and faculty has been convicted of any felony or misdemeanor involving violence or for sexual contact and/or sexual abuse. It shall be the duty of the vendor to conduct the appropriate background checks on its employees and vendor agrees to share this information with KCPS upon request.

**PAYMENT REMIT TO ADDRESS:**

Where the respondent is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.

<table>
<thead>
<tr>
<th>Signature of Official:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name &amp; Title (printed/typed):</td>
</tr>
<tr>
<td>Company Name:</td>
</tr>
<tr>
<td>Date:</td>
</tr>
</tbody>
</table>

**Is the Company a certified MBE or WBE?**

Yes [ ] No [ ]

I hereby acknowledge that the information provided is current, accurate and complete as of the date of this submission.

Print Name [ ]
Signature [ ]
Date [ ]

*Please submit a completed Request for Taxpayer Identification Number and Certification, W-9 form with the completed Vendor Registration Form. Requests not containing all forms will not be processed per IRS compliance and To obtain instructions on completing the W-9 form please visit http://www.irs.gov/pub/irs-pdf/f9w9.pdf*
Vendor Application
## Vendor Application

### Vendor Information
- **Description of Request:** [ ] New [ ] Change [X] Cancel
- **Taxpayer ID Type:** [ ] ID/TIN [ ] SSN
- **Vendor Name:**
- **Address:**
- **City:**
- **State:**
- **Zip Code:**
- **Taxpayer ID Number:**
- **Contact Name:**
- **Title:**
- **Business Phone:**
- **Business Fax:**
- **E-Mail Address:**

### Financial Institution Information
- **Financial Institution Name:**
- **Financial Institution Phone:**
- **Address:**
- **City:**
- **State:**
- **Zip Code:**
- **Depositor Routing Number:**
- **Depositor Account Number:**

### 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:**

### Vendor Authorization
- Vendor hereby authorize 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.

- [ ] Vendor hereby **DECLINES** this ACH
- [ ] Vendor hereby **ACCEPTS** this ACH

- **Printed Name and Title:**
- **Signature:**
- **Date:**
Vendor Activation Request Form

Assigned Vendor No.________________

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 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. One of the quotes should be from a MBE/WBE vendor
  - 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
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.
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

Requisition Process
PURCHASING
CONTRACTS & SERVICE AGREEMENTS
Contract & Service Agreement Form
(previously referred to as P&C Form)

• The form can be found online at:
  http://kcpublicschools.org/departments/purchasing

• You must sign in to your KCPS Gmail account 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
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: http://kcpublicschools.org/departments/purchasing
FORMAL BID PROCESS
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.

Purchases less than $3,500 require a minimum of one quote.

Purchases $3,500 – $50,000 require a minimum of three quotes, unless the Vendor is a Sole Source. In this case, the Sole Source Justification Form must be included. One of the quotes should be from a MBE/WBE vendor.

Purchases greater than $50,000 require a formal bid process, including 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
  - Account Code
  - 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
  - Bids for Construction Projects, estimated over $50,000, an 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-users
  - 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 and the term (i.e. renewal options).

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 the 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 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: http://kcpublicschools.org/departments/purchasing

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)
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

• 1\textsuperscript{st} Tier Diverse Spend opportunities as a Prime Vendor to KCPS
• 2\textsuperscript{nd} Tier Diverse Spend opportunities with KCPS’s Prime Vendors
  ▪ RFP Requirement - Prime Vendors can submit 2\textsuperscript{nd} Tier (subcontracting) opportunities during the bid process
  ▪ Contract Requirement- Prime Vendors report 2\textsuperscript{nd} Tier actual diverse spend on a quarterly basis to KCPS
KCPS Annual MBE / WBE Goals

- KCPS has adopted a **combined annual goal of 18.3%** of applicable spend.
  - **MBE Goal is set to 9.8%** based upon current market availability.
  - **WBE Goal is set to 8.5%** based upon current market availability.
QUESTIONS?