



PURCHASING PROCEDURES

Updated August 2021

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

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 APPLICATION

(Revised 3-2019)

PLEASE COMPLETE INFORMATION BELOW	
LEGAL BUSINESS NAME: (Company must match Federal Tax ID (EIN) or Individual must match SSN)	TYPE OF BUSINESS: (Check below any that apply) <input type="checkbox"/> Service(s) <input type="checkbox"/> Goods <input type="checkbox"/> Construction <input type="checkbox"/> Other
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 Debarment and Suspension, please initial each of the following statements: A. <input type="checkbox"/> Are not presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded from covered transactions by any federal department or agency; B. <input type="checkbox"/> Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property C. <input type="checkbox"/> Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and D. <input type="checkbox"/> 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. E. <input type="checkbox"/> Certifies that no employee who will enter school buildings or potentially have contact with school children has been convicted of any felony or a misdemeanor involving violence and/or 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.
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. Signature of Official: Name & Title (printed/typed): Company Name: Date:
City:	
State:	
Zip:	
Phone:	
Must Provide an Email Address	
E-Mail:	
Attention:	
PAYMENT REMIT TO ADDRESS:	
NIPG COMMODITY /SERVICE CLASS CODE(s): (REQUIRED) Please list NIPG Commodity/Service Class Code(s) below: Please click link below for a complete listing of the NIPG Commodity/Service Class Codes: http://www.kcpublicschools.org/Page/211	Is this Company a certified MBE or WBE? Yes <input type="checkbox"/> No <input type="checkbox"/>

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/fw9.pdf>*

Vendor Application

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation

☐ S Corporation

☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

6 City, state, and ZIP code

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.
Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
[][]-[][]-[][][][][][]

or
Employer identification number
[][]-[][][][][][][][]

Part II Certification
Under penalties of perjury, I certify that:
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶

Date ▶

General Instructions
Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.
Purpose of Form
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.
• Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)

9

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. 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

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:
<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**

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: <http://kcpublicschools.org/departments/purchasing>

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.
- 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 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:

<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)

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 can 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

- 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.
- KCPS adopted its current MBE/WBE Policy on January 9, 2019.



QUESTIONS?