



SUPPLY CHAIN HANDBOOK

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FOREWORD

As stewards of public funds from Federal, State and Local taxpayers, we all have a responsibility to spend these funds in an efficient, effective and proper manner. That responsibility requires compliance with all Federal, State and Local policies and legal statutes. The purchasing, receiving, storing, and distribution of necessary items for use in the educational program of a school system in conjunction with the maintenance and operation of the system's school buildings all represent a very sizeable expenditure of money. Consequently, it is necessary that basic policies and procedures be established to serve as guidelines in this area of responsibility.

The Supply Chain Department has two major and sometimes conflicting responsibilities. They are responsible to the various schools and departments for procuring the necessary items of supplies and equipment when they are needed and, at the same time, they have a responsibility to the taxpayers for purchasing the approved items at the best possible value and for providing adequate records to show that this was done. It will aid the purchasing operation if teachers, principals, and other administrators understand that upon the Supply Chain Department rests the obligation to assure open competition and to maintain adequate accounting records. However, the Supply Chain Department must never forget the importance to the educational process of obtaining the right supplies at the right time. In order to serve best that the most important end product, the student, purchasing is the support service for the teacher, principal, custodian, secretary and other individuals who use their services to provide for education of the student. For an efficient operation there simply must be close cooperation between the Supply Chain Department and the using department, school or person.

This handbook has been prepared primarily for the guidance of the administrative personnel responsible for purchase and supply; however, it is felt the information and guidelines contained in the document will be of value to the several schools and departments served by the Supply Chain Department.

SUPPLY CHAIN DUTIES, GOALS, AND OBJECTIVES

The Supply Chain Department performs the following primary functions:

- Becomes familiar with the products and services commonly used by the school system.
- Studies price trends and market conditions; keeps informed of sources of supply and new product developments.
- To comply with the letter and spirit of the laws governing the purchasing function including applicable Federal and State rules and regulations and School Board Policies and remain alert to the legal ramifications of the purchasing decisions.
- Studies the Louisiana Public Bid Law relative to the proper acquisition of goods and services. Determines that all purchases are in accordance with the bid law.
- To represent the Ascension Parish School Board in an exemplary manner by diligently following the lawful instructions of the Board, using reasonable care and only the authority granted, and avoiding the intent and appearance of unethical or compromising practices in relationships, actions, and communications.
- Contacts vendors relative to supply and equipment availability, purchase orders, and contracts.
- Responsible for the warehousing, shipping and receiving for the school system, including maintaining an accurate perpetual inventory of items in warehouse.
- To buy without prejudice, seeking to obtain the maximum ultimate value for each dollar of expenditure and encouraging all segments of society by extending an opportunity to participate to minority, veteran, and small businesses.
- Purchases all goods, services, and equipment used in the school system upon receipt of properly approved RTBs.
- To handle information that may be considered confidential or proprietary to the School Board and/or its suppliers with due care and proper consideration of ethical and legal consequences and government regulations.
- Monitors RTBs (Request to Buy) to insure correctness of data.
- Maintain an accurate and up to date system of records and files.
- Tabulates bids and prepares recommendations for presentation at Board Meetings.
- Consults with salesmen and/or vendors.
- Strives to maintain up to date files of responsible bidders to assure the Board gets the best price available on the desired product, consistent with quality and service.
- Makes every effort to obtain the highest quality items for the lowest prices.
- Assists in conducting the sale of salvage or surplus of equipment by auction.

MISSION STATEMENT

The mission of the Supply Chain Department for the Ascension Parish School Board (APSB) is to support the educational process by obtaining quality materials and services in a timely and cost-effective manner. This involves creating a setting where the department would utilize the most effective and innovative methods for procuring quality goods and services. Responsibilities include providing the school system with policies and procedures that foster an ethical, responsive and efficient environment and recognizing the department's obligations to suppliers and internal customers. The APSB Supply Chain Department is committed to the highest standard of service and continuously strives for improvement in all areas of procurement practices.

CODE OF ETHICS

APSB recognizes the importance of codifying and making known to the profession and to the general public the ethical principles that guide the practices of the Supply Chain Department. Ethical dilemmas occur when values are in conflict. The Code of Ethics states the values to which the Supply Chain Department is committed, and embodies the ethical responsibilities of procurement profession. The principles of this Code are expressed in broad statements to guide ethical decision making.

- Uphold the highest ideals of honor and integrity in all public and personal relationships in order to merit the respect and inspire the confidence of the school system and the public served.
- Value the dignity and worth of the services rendered and the social responsibilities assumed as a trusted public servant.
- Give first consideration to the interests of the school system and the betterment of its educational program by obtaining the greatest value from every tax dollar expended.
- Conduct business with all potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentation.
- Abstain from personal aggrandizement or personal profit that may be obtained through misuse of public or personal relationships.
- Keep the governmental organization informed, through appropriate channels, on problems and progress of applicable operations by emphasizing the importance of the facts.
- Refuse to accept gifts, gratuities or other things of value from suppliers, which might influence or appear to influence purchasing decisions.
- Enhance the proficiency and stature of the purchasing profession by acquiring and maintaining current knowledge as to procurement laws and guidelines.
- Commit to the highest standard of service and continuously strive for improvement in all areas of procurement practices.
- Refrain from any private business or professional activity that may present a conflict of interest in carrying out the business assigned by APSB.

Supply Chain personnel are to consider first the interests of the school system and the betterment of its educational program. The department endeavors to obtain the greatest value from every tax dollar expended.

Because a large portion of revenues generated for the operation of the School Board are derived through local taxation of businesses and industry in Ascension Parish, all local merchants shall be given fair and equal opportunities regarding Board purchases. APSB will seek business and bids from all eligible vendors, regardless of race, creed, color, sex, national origin, age or handicap. No favoritism will be extended to any vendor. Purchases shall be made at the lowest possible cost to the school district consistent with the system specifications of quality and service.

Personnel shall strive to accord a prompt and courteous reception, insofar as conditions permit, to all who call on legitimate business missions. The basic philosophy is to give all responsible bidders equal consideration and the assurance of unbiased judgment in determining whether their product meets specifications and the educational needs of the school system.

GENERAL GUIDELINES FOR PURCHASING

The Supply Chain Department

Responsible for the oversight of the various purchases made involving the School Board's funding and the implementation of this policy manual. The Supply Chain Department will provide for compliance of this policy, state bid law, and all other applicable provisions of state and federal law governing the purchasing and contracts.

Types of Purchases

There are several different types of purchases that require different approaches. Non-routine categories of purchases frequently will take longer to process and should be minimized.

- Non-Stocked Items – These items are not stocked or warehoused.
- Stocked or Warehouse Items – These items are used constantly and are stocked routinely.
- Public Emergency or Extreme Public Emergency Purchases – Louisiana law defines a public emergency as “an unforeseen mischance bringing with it destruction or injury of life or property or the imminent threat of such destruction or injury.” A public emergency must be approved by the Superintendent or his designee.
- Sole Source Purchases – Sole source purchases are goods and services available from only one supplier because of patents, copyrights or simply because the vendor is the only one which supplies that product or service. Generally speaking, these purchases are usually exempted from the purchasing requirement but require special documentation for auditing purposes.
- Registrations – Registrations for conferences, seminars and conventions are approved after permission to travel outside the parish has been authorized by the Superintendent or his designee.
- Books, Magazines, and Newspapers – These items include library books, textbooks (print, digital, electronic), magazines, periodicals and newspapers.
- Contracted Services – Examples include plumbers, electricians, and carpenters.
- Insurance – This includes general liability insurance, property & casualty insurance, errors and omissions insurance, fleet insurance, medical insurance, dental insurance, etc.
- Professional Services – Examples include receiving services from medical doctors, occupational therapists, physical therapists, auditors, accountants, and lawyers.
- Leases or Rentals – Leases and rentals require authorization from the Superintendent or his designee. Additional approval must be granted by the Louisiana State Bond Commission for Lease Purchase Contracts if the lease agreement doesn't have a non-appropriation clause.
- Vehicles and Buses – Vehicles and buses can only be purchased on state contract or through formal competitive bidding if the total cost exceeds \$30,000.

The Purchase Order

The APSB purchase order is the seller's authority to ship and invoice for the goods specified on the order. The purchase order is a legal document which symbolizes the acceptance of an offer. When the purchase order is submitted to a vendor, a contractual relationship is established.

The purchase order is the most important of the purchasing forms. While it is unnecessary to employ intricate legal phrasing in the text of the order, its importance as a legally binding document should not be minimized. It should cover definitely and precisely the essential elements of the purchase in such a manner as to preclude future misunderstandings which are invariably costly.

Important elements of the purchase order are:

- Purchase order number
- Date
- Vendor name and address
- Vendor number
- Delivery address
- Quantity of items being ordered
- Unit price
- Shipping cost if applicable
- Extended total
- Sum total
- Signature of the Supervisor of Supply Chain
- If applicable, any other pertinent information needed for the purchase (i.e. sealed bid number, quote number, member number, contact information if digital items are purchased and/or notes to the vendor, etc.)

Record Keeping

The Supply Chain Department keeps records of every order placed, sealed bid, RFP, and RFQ documentation for seven (7) years. Sealed bids, RFPs and RFQs are public records and are subject to inspection and copying.

Authority to Issue Orders

Regulations regarding the issuance of purchase orders are as follows:

- The School Board must approve all formal bids.
- The Supply Chain Department has the authority to issue orders under circumstances other than those specifically requiring Board approvals. Telephone, fax and written quotes are used to secure goods that are not formally bid.

ORDERING PROCEDURES

ASPB shall require, in accordance with sound principles of financial accounting, appropriate steps to follow in obtaining items purchased in the name of the Board. All such purchases must follow these guidelines in order to be considered by the administrative staff:

- Determine Needs – Check with your immediate supervisor to determine if the needed items can be supplied through existing inventory within your facility.
- Determine Funding Authority – If this item is not available within your facility, check with your immediate supervisor to determine if funding is available in the current budget.
- Enter RTB (Request to Buy) in Alio – (see Appendix C) It is the responsibility of the person requesting the items/services to properly fill out the RTB with all of the information needed to purchase the items/services.
- Obtain Approval of RTB – Alio will prompt approvals as needed depending on line item amount and location.
- Processing RTB – The Supply Chain Department will analyze the RTB and take one of four steps, as listed below:
 - Issue a purchase order outright;
 - Obtain informal quotes before issuing a purchase order;
 - Buy off of state contract;
 - Obtain formal sealed bids.
- Issuing Purchase Orders – Once the RTB has been processed and/or bids have been approved, the purchase order is sent to the vendor.
- Receive Merchandise – All supplies and equipment will be delivered to the Supply Chain Warehouse. However, the Supply Chain Department has the option to have furniture, kitchen equipment or other large items delivered directly to their respective sites.
- Payment of Purchases – After merchandise is received and inspected, it will be received in Alio. This process will inform the Accounts Payable Department that the invoice is ready for payment.

BIDS AND QUOTATIONS

Public Works

APSB shall advertise and receive bids through the formal sealed bidding process, except in cases of emergencies, for all public works exceeding \$250,000.00 (including labor, materials, equipment, and administrative overhead not to exceed fifteen percent (15%)). Bids are publicly opened and read aloud for interested parties in attendance. The contract shall be awarded to the lowest responsible bidder who has bid according to the contract, plans, and specifications advertised. The winning bidder must have a current state license. The Board may undertake public works, other than the construction of buildings, with its own employees.

As an evidence of good faith of the bidder, the Board shall require bidders for construction, improvement, repair, or other work to attach a bid bond, a certified check, or a cashier's check of not more than five percent (5%) of the contract work to the submitted bid.

When any bid is accepted for construction or doing any public works, a written contract shall be entered into by the successful bidder and the School Board, and the successful bidder shall furnish a performance bond for at least 50% of the contract amount, to insure the faithful performance of his or her duties.

Under no circumstances shall there be a division or separation of any public work project whereas the division or separation would have the effect of avoiding the public bid law.

Additional requirements of the Public Bid Law are:

- Construction of buildings may be undertaken with School Board employees if the total construction cost is less than \$250,000.00. Otherwise construction of buildings must be contracted out.
- Contracts for construction, which are over \$50,000.00, even if not bid out, will require the use of an appropriate state licensed contractor.
- All public works contracts in excess of \$25,000.00 must be reduced to writing and recorded with the Clerk of Court.
- All public works contracts in excess of \$25,000.00 must have a payment bond for at least 50% of the contract amount. A payment bond is for the protection of sub-contractors, laborers, and suppliers.
- Performance bonds on jobs of less than \$25,000.00 are optional.

Materials and Supplies

APSB shall advertise and receive bids through the formal sealed bidding process for purchases of materials or supplies exceeding the sum of \$60,000.00. The bid shall be awarded to the lowest responsible bidder who has bid according to the specifications as advertised. If a vendor is selected because of reasons other than the lowest price, those reasons will be fully documented and notation shall be entered into the file as to the reasons for rejection of the lower bids.

Purchases of materials or supplies of at least \$30,000.00, but not more than \$60,000.00, shall be made by obtaining at least three written, faxed, or emailed quotes. Again, if a vendor is selected because of reasons other than the lowest price, those reasons will be fully documented and notation shall be entered into the file as to the reasons for rejection of the lower quotes.

The public bid law for purchases of materials and supplies of less than \$30,000.00 specifies no procedure. However, the Supply Chain Department recommends that at least three quotes for purchases of more than \$1,000.00 be obtained, this insures that the School Board receives the best possible goods at the lowest price.

As an alternative, if equipment, materials or supplies are available from a State of Louisiana Contract or other qualified cooperative, the Supply Chain Department may approve the purchase, if advantageous to the School Board.

- If the state contract is designated as a Louisiana Pricing Schedule Contract (LaPS). Buyers must follow the following steps for a Request for Response (RFR).
 - Where multiple LaPS contracts exist for functionally equivalent products and/or services and the procurement is above \$25,000, all eligible users of these contracts will submit the Request for Response to at least three (3) LaPS contract holders, whenever available, offering functionally equivalent products and/or services that will meet the agency's needs.

Purchases cannot be divided by departments or by a school if the effect is to evade the state's public bid law. Purchases of commodities that are bought in small but recurring amounts through the year shall be bid on an annual basis.

Federal Funds

According to the Uniform Grants Guidance (Section 200.320), the method of procurement is as follows (see Appendix B):

- Materials/Supplies – follow more restrictive state requirements (Public Bid Law, Title 38);
- Public Works – follow more restrictive state requirements (Public Bid Law, Title 38);
- Services – follow Federal guidelines (Sealed Bid or RFP needed for services over \$250,000).

Public Bid Law Application

The Louisiana Public Bid Law, Louisiana Revised Statutes, Title 38, Chapter 10, applies to public works and to purchases of materials, supplies, and vehicles, as stated above.

Purchases Exempt from Price Quotations or Bids:

- Professional Services – Doctors, lawyers, engineers, architects, physical and occupational therapists, certified public accountants, land surveyors, and real estate appraisers (except for Federal Grants)
- Publications – Textbooks, library books, magazines and newspapers
- Insurance – General liability, property & casualty, errors & omissions, fleet, faithful performance bonds, student accident, medical, dental and life
- Dues and Fees – Registrations for conferences, seminars and workshops; Membership in trade and professional organizations; Processing fees for the Louisiana State Police to run background checks on prospective employees; Election fees; tax collection fees; or fees to colleges and universities for teacher recruiting
- Labor Only Contracts – Computer repair technicians, carpenters, plumbers, painters and electricians (except for Federal Grants)
- Sole Source Purchases – Goods protected by Patents and Copyrights
- Extreme Public Emergency Purchases as defined by Louisiana Law
- State Contract Purchases – Materials, supplies, equipment, furniture, and other items that are available from a State of Louisiana Contract
- Piggy Back Purchases – Formal competitive bids by another School Board or other political subdivisions of the State of Louisiana
- Cooperative Endeavor Agreements

Emergencies

In cases of extreme emergency when time is not sufficient to advertise for bids for public works or material and supplies, the Board is permitted by law to declare that a public emergency exists and extend a contract for more than the sums mentioned without going out to bid; however, in such cases every effort shall be made by the administration to secure competitive quotations through negotiations.

An “emergency” means an unforeseen mischance bringing with it destruction, or injury of life, or property, or the imminent threat of such destruction or injury, or as the result of an order from any judicial body to take immediate action which requires construction or repairs.

In cases of emergency where such emergency has been certified by the Board, the goods, services or major repairs may be procured in an abbreviated timeline. The advertisement requirement of the Public Bid Law shall not apply.

- The Superintendent must provide a written recommendation describing the emergency situation to the School Board. If the School Board certifies the existence of such emergency, the provisions of the Louisiana Public Bid Law shall be followed.
- If an extreme emergency situation requires the purchase of goods or services or major repairs by Superintendent prior to declaration of same by the School Board, after obtaining prior approval by the President or Vice President said purchase shall be placed on the Agenda for ratification at either a regular or special meeting held no later than ten (10) days from the date of said emergency purchase.
- The procurement method selected must assure that the goods, services, or major repairs are purchased in time to meet the emergency
 - Competition as practicable should be obtained, i.e. telephone quotations, written quotations or sealed bids. Any offer accepted must be confirmed in writing.
 - A record of the emergency procurement shall be maintained that lists a description of the supplies, services, or major repairs procured under each contract; the name and address of each bidder quoting; the amount and type of each contract; and the identification number of each contract file.
 - If quotations are received that are lower than the accepted quotation, the reason(s) for their rejection shall be recorded and made a part of the contract file.
- Records shall be maintained for a minimum of seven (7) years following the purchase or completion of the repairs.

Bid Advertisements

All advertisements for formal bids shall appear in the newspaper selected as the official journal for the School Board, except in extreme emergencies as may be declared by the Board. Any advertisement for any contract for public works, when published, shall appear once a week for three weeks in the official journal and the first advertisement shall appear at least twenty-five days before the opening of the bids. Public works bids must be posted to an online website for public viewing also.

Any advertisement for the purchase of materials or supplies shall be published two times in the official journal, the first advertisement appearing at least fifteen days prior to the opening of bids, and must be posted to an online website for public viewing also.

In any advertisement, the first publication shall not occur on a Saturday, Sunday, or legal holiday.

The School Board shall not issue or cause to be issued any addendum modifying plans and specifications within a period of seventy-two hours prior to the bid opening; however, if the necessity arises to issue an addendum modifying plans and specifications within the seventy-two-hour period prior to the bid opening, the opening of bids shall be extended at least seven working days, but not to exceed twenty-one working days, without the requirement of re-advertising. The addendum shall state the revised time and date for the opening of bids.

Opening of Bids

All bids shall be opened and read aloud in public in the presence of one or more witnesses, at the time and place designated in the invitation for bids. Each bid, together with the name of the bidder, shall be recorded and opened to public inspection. However, the School Board shall not accept or take any bids including receiving any hand delivered bids, on days which are recognized as holidays by the United States Postal Service. The Supply Chain Department shall review, summarize and report bids to the Board with recommendations for final action.

Once the required advertisement has occurred, all sealed bids shall be collected and recorded by the Supply Chain Department until they are publicly opened. The Supply Chain Department shall maintain all records, as well as notify all the vendors submitting valid bids, of the bid results.

The bid opening/evaluation shall be executed in two phases:

Phase 1: The sealed bids will be collected and opened publicly at the time and place designated in the bid advertisement. This phase shall be performed by the Bid Opening Committee. The sole purpose of the Bid Opening Committee shall be to ensure that all bids are publicly opened, and recorded in a professional and ethical manner that is consistent with state law. A completed bid tabulation spreadsheet shall be turned over to the Bid Review Committee, which will evaluate the bids at a later date.

Phase 2: The evaluating and the recommendation of award to the prospective bidder(s) shall be the responsibility of the Bid Review Committee. A letter of recommendation of award shall be generated from this committee after all evaluations are completed.

A bid packet, containing the letter of recommendation and the bid tally spreadsheet shall be presented to the Superintendent for his/her signature. Once the Superintendent's signature is obtained, the completed bid packet shall be presented to the School Board for review at the next scheduled Board meeting. After the School Board acts on the bid, the Supply Chain Department shall notify all vendors on the action being taken.

Bids are public records and are subject to inspection and copying; however, the Supply Chain Department should take precautions to avoid tampering. Bids become public records either 14 days after the bid opening or recommendation to award, whichever is sooner. No comment should be made at the bid opening regarding the low bid or about award. The Supply Chain Department may state that the bids will be taken under advisement and a recommendation will be made to the School Board.

When a purchase is to be made, the Supply Chain Department strives and is obligated to select the best bid in the interest of the school system. The lowest and best bid is the lowest bid meeting specifications. Should, for any reason, the lowest bid not meet specifications or acceptance, the next acceptable bid is taken. When the best bid is not the lowest received, the Supply Chain Department requests justification. The justification may be requested in writing from the using department giving complete details on why the low bid should be waived. On orders requiring approval of the Board, the justification is included in the Board report. Each bid is carefully analyzed as to: Quality, price, delivery and warranty.

If the School Board proposes to disqualify any bidder, the School Board shall:

- Give written notice of the proposed disqualification to the bidder, and include in the written notice all reasons for the disqualification; and
- Give bidder, who is proposed to be disqualified, the opportunity to be heard at an informal hearing, at which time bidder is afforded the opportunity to refute the reasons for the disqualification.

Bid Specifications

Quality is just as important as price, and it is the duty of the Supply Chain Department working in conjunction with the using department to secure the best quality for the purpose intended. Quality buying is defined as the purchase of goods, supplies, materials, equipment, or services that will fulfill but not exceed the requirements for the purpose intended.

Proper specifications aid in obtaining proper quality. The Supply Chain Department must work closely with the using departments in writing adequate specifications for large purchases and updating current specifications. Bid specifications, briefly defined, are an accurate description of the material to be purchased. Specifications must be:

- Simple, clear, and concise.
- Thorough to discourage the bidding of materials not consistent with the quality requested.
- Capable of being checked. If a specification cannot be checked, it is of little value.
- Capable of being met by several bidders unless there is only one supplier (sole source). “Sole Source” letters are secured from vendors as verification in such an event.
- As fair to the vendors as possible.

Specification may use a brand name and model number to indicate general quality and character of product sought, but must also clearly state the products of similar quality and character will be acceptable (brand name or approved equal).

Certain commodities such as gasoline may require the use of an index price to establish a price that adjusts with market conditions. Competition between bidders is based solely on the “margin over index price” which the bidder offers.

Specifications can call for no more than three alternates and when making an award, alternates must be accepted in the order that they are listed in the solicitation unless doing otherwise has no impact of the award.

Awarding of Bid

The awarding of a bid is based upon bidder responsiveness as well as the bidder’s capacity to perform. In contracting by sealed bidding, the award goes to the low, responsive, responsible bidder whose price is both fair and reasonable.

A responsive bid is one that conforms to the material requirements of the invitation to bid. It is the bidder’s promise to provide the school system exactly what is being asked for as outlined in the bid document. Any bid that fails to conform to the invitation to bid is rejected as being non-responsive. Factors considered when evaluating bidder responsiveness are based upon the following information:

- Does the bid conform to the delivery scheduled as specified?
- Does the bid offer the supplies or services as required in the bid specifications?
- Does the bid provide clearly written prices on the bid form?

- Does the bidder offer conditions to the bid that are not authorized?
- Has the bidder accepted all of the terms and conditions as indicated in the bid?
- Has the bid been submitted timely and according to the required method of delivery?

The responsiveness requirement stands for the proposition that the Supply Chain Department must reject any bid that fails to comply with the invitation to bid in any material manner.

Bidder responsibility involves the question of whether the company can or will perform as he has promised. The question of performance is central in determining responsibility. Determining responsibility should be done prior to the bid award and may involve the following:

- The vendor should have a satisfactory performance record.
- The vendor must be able to perform the work or services required in the contract.
- The vendor must be available to perform.
- The vendor should have no record of criminal offenses in connection with attempting to obtain an entity contract or subcontract.
- The vendor should be financially sound.
- The vendor must be able to meet any special standards.

Adequate records and data are important in determining contractor responsibility. The burden of proof lies with the contractor. The prospective contractor can provide data to support its claim of responsibility such as previous records that demonstrate performance, financial records, quality and quantity of personnel employed to do the job, technical level of manufacturing capability, etc. If the prospective contractor is found to be non-responsible, the Supply Chain Department should document the file with the reasons for the determination of non-responsibility.

List of Bidders

After sufficient specifications have been developed by the user and the Supply Chain Department, quotations must be secured. It is the responsibility of the Supply Chain Department to maintain active and up-to-date files on vendors wishing to participate in the bidding and to send interested bidders invitation to bid/quote. Purchasing must also comply with the Louisiana Public Bid Law as stated above.

The Supply Chain Department is expected to encourage competitive bidding by extending a courteous reception to interested parties, giving equal brands fair consideration and seeking competitive sources of supply.

Request for Proposals

Professional services, telecommunications, data processing equipment, software, and equipment leases may be acquired either by public bidding or by means of a Request for Proposals (RFP). An RFP may give greater flexibility in making an award since the proposers may be graded on a variety of criteria. The criteria in an RFP may be set forth and weighted in the process of evaluating proposals. Prospective proposers should be informed in advance of the criteria to be utilized and the weight assigned to each criterion.

The Supply Chain Department shall recommend to the School Board an award to the responsible offeror whose proposal is determined in writing to be the most advantageous, taking into consideration the price and other evaluation factors set forth in the RFP.

Rejection of Bids

Any and all bids received in response to an invitation to bid can be rejected if the bidder is not deemed responsible, or the character or quality of the services, supplies, equipment, or labor does not conform to requirements or if the Board's interest is otherwise served thereby. "Responsibility" refers to the character or quality of the bidder – whether it is an entity with which the School Board considers safe doing business. Past performance is considered when determining a bidder's responsibility.

Bids may be rejected when the best price received is unreasonable or unjustified. When appropriate, the Supply Chain Department may recommend rejection to re-bid for a reasonable price. When the low bid does not meet specifications, bidders shall be notified in writing the reason(s) for the rejection, per R.S. 38:2212.

Late Bids

All formal invitations to bid must specify a specific date and time for the public opening of the bid. Each vendor has the responsibility for seeing that his bid arrives in time.

Bids may be hand delivered, and a receipt obtained, or bids may be mailed. Any bid not delivered on time or not hand delivered/mailed is returned unopened.

Sole Source Items

Certain software, testing materials, instructional materials are "Sole Source" items than can only be obtained from one vendor. These items do not have to be bid. The Supply Chain Department should secure "Sole Source" letters from the vendors as verification and justification letters from the requesting department. These are kept on file as part of the purchase order documentation.

Louisiana Preference

Preferences for purchases of materials, supplies, and provisions, produced, grown, manufactured or processed in Louisiana are entitled to a mandatory 10% price preference over products produced elsewhere. There is no preference for a Louisiana vendor, only for Louisiana produced products. Also, the preference does not apply to any school food service purchases.

There is no preference in contracts for public works, only a retaliatory preference. If the state of the out of state low bidder has a preference for its contractors, then the same preference for Louisiana contractors will be given when bids include those out of state contractors here.

For all other products purchased, the School Board may choose to allow a bidder offering a Louisiana product and whose price is within 10% of the low bid to receive the award if the bidder is willing to sell at the low bid price.

Mistakes in Bidding

Prior to the opening of any bid, the vendor retains the right to withdraw his bid for any reason. The bid will be reaccepted any time prior to the stated opening time and date.

If a mistake is discovered after the opening of the bid but prior to acceptance by the Board, relief may be provided at the discretion of the Supply Chain Department. Requests for relief by withdrawal must be made in writing. To qualify for relief the error must be obvious or have been made under other circumstances considered excusable. The Supply Chain Department then may grant the vendor's written request to withdraw his bid with

or without prejudice. Further, simple and very obvious mathematical errors such as improper placement of a decimal or transposition of numbers or neglecting the carry forward totals from one bid page to the other can be corrected by the Supply Chain Department with the bidder's knowledge. The corrections of any errors that cannot be clearly defined or that would in any way cause or appear to cause a questionable award are not permitted.

Only the Board can correct mistakes that are discovered after the Board has already awarded the bid. The vendor must explain his mistake in writing for the Board's consideration at their next regular meeting. Relief may or may not be granted as the Board determines, but such relief, if given, may carry a penalty as provided in the specifications.

Tie Bids

Tie bids, quality being equal, are decided in the following manner:

Method of awarding: Flip of Coin or Hat Draw

- Ties between local bidders
- Ties between intrastate bidders – not local
- Ties between out-of-state bidders

Method of awarding: Award to Local Bidder

- Ties between local bidder and out-of-town/out-of-state bidder

Method of awarding: Award to Louisiana Bidder

- Ties between Louisiana bidder and out-of-state bidder

Deposits of Good Faith (Bid Bond)

On certain bids the Supply Chain Department may deem it necessary to require deposits of good faith. A bid bond for 5% of the anticipated contract amount is mandatory on all public works solicitations advertised for bid. A bid bond is optional on any solicitation for the purchase of materials and supplies. The invitation to bid specifies the deposit amount. A certified check, cashier's check, money order, or properly executed bond should accompany the bid proposal. Checks should be made payable to the Ascension Parish School Board.

Deposits of the bidders are held until the award of the order and/or a contract is made. The deposit of the successful bidder is held until he has completed delivery or services or, if required provided a performance bond.

SALE OF SURPLUS EQUIPMENT AND SUPPLIES

Merchandise and equipment no longer usable for the purpose for which it was acquired or built shall be declared surplus by the Superintendent upon notification by the department to which the merchandise or equipment has been assigned. The equipment and appliances will then be inspected to determine if they are usable or should be declared surplus. If the items are declared surplus, the Ascension Parish School Board shall then call for sealed bids and/or public auction for the sale of such merchandise or equipment. A minimum fair value price shall be established for each item and the bid price shall start at that point for items considered worthy. Said bids shall be opened publicly and disposed of in a prudent, businesslike manner. The School Board shall reserve the right to accept or reject any and all bids.

The sale of surplus merchandise or equipment shall be final, on the "as is" or "where is" basis and shall carry no warranties whatsoever. If not sold, these items shall be sold as junk, or if no salvage value can be realized, destroyed in the most economical manner possible.

Computing Devices

When the School Board determines that an individual computing device used by a student or students has reached the end of its typical life cycle, is no longer needed for school purposes, and will be removed from classroom use, and that the best interest of the public school system would be served by the private sale of such device due to the cost of auctioning the device or recycling it or due to other factors, the School Board may sell the device to a student enrolled in a school in the school system or to the parent, tutor, or legal guardian of such a student.

The sale price for the device shall be reasonably equivalent to the value of the device, taking into consideration its typical life cycle, current condition, and costs of other methods of alienation or disposal.

All such sales shall be in accordance with School Board policies, and sale prices shall be approved by appropriate school system administrative personnel prior to sale. Such sales shall apply only to individual computing devices used for classwork by students and shall not apply to other computer equipment or related equipment such as routers, switches, or servers.

RECEIVING AND WAREHOUSING

Receipt and Delivery Processes

The Supply Chain Department is responsible for the warehousing, inventory control, and distribution of instructional and operating supplies.

The warehouse should follow certain steps in checking goods received:

- Unload shipment from delivery trucks.
- Check the shipment externally for evidence of severe damage that may indicate it has been dropped, crushed, etc.
 - If the shipment is damaged, it should be brought to the attention of the driver and noted by him on his delivery receipt.
 - Should a shipment be so damaged that it can easily be determined that the contents are damaged, the Material Control Coordinator should be notified at once. Further instructions will be received.
- Log shipment into the “Warehouse Daily Log Book”
 - Information needed: vendor, number of boxes delivered, and the company that delivered.
- Move the shipment to the receiving area.
- A receiving warehouseman will check the contents of the shipment against the packing list/purchase order, checking item numbers, descriptions and quantities. This process is then repeated and double checked by another warehouseman.
 - If a packing list is not included in shipment, the warehouseman is to let the buyer know so they can contact the company for one.
 - Any discrepancies should be noted and brought to the attention of the Material Control Coordinator.
- The purchase order number and date are to be written on top of the box.
- Copy the tracking number from the shipment to the packing list/purchase order.
- Give all paperwork to the warehouse secretary.
 - Warehouse secretary is responsible for receiving purchase orders in Alio to create the delivery tickets. These are signed by the receiver and provide a record of delivery. A copy is given to the receiver and the signed copy is brought back to the warehouse to be filed.
- Move the shipment to the staging area.
 - Get delivery tickets from the warehouse secretary.
 - Check delivery ticket against the packages listed (check purchase order number and tracking numbers)
 - Write school name on top of the box and put the paperwork with the packages.
- Move packages to the delivery area under the correct school/location.
- Driver goes to delivery area and pulls the delivery tickets for the school they will be delivering to.
 - Check the paperwork to make sure they have the right location and number of packages.
 - Places all packages for each location on a pallet and loads onto truck.
- Driver delivers packages to the correct location and gets signatures on delivery tickets. One copy is left at the school/location and one copy is brought back to the warehouse.
- Driver gives their paperwork to the warehouse secretary.
 - All delivery tickets are scanned and saved for future reference.

Inventory Control

The Supervisor of Supply Chain delegates authority to the Material Control Coordinator to see that inventory supplies are not subject to loss or administrative mismanagement. The management of supplies is no less

important than buying them. The maintenance of adequate records of supplies and equipment available for issue in the central warehouse is a prime requisite of good school business management.

Warehoused items are kept under a perpetual inventory system, Alio. Warehouse orders are placed by the schools and delivered by the warehouse drivers. Alio records a continuous tabulation of materials on hand and reflects the current status of receipts and stock issues. An actual physical inventory is taken once per quarter to adjust the system.

Warehouse Stock Items

When warehouse stock orders are entered into Alio, the following steps should be followed:

- The warehouse secretary prints the warehouse orders from Alio and gives to a warehouseman.
- The warehouseman will pull the items from the warehouse stock.
- The warehouseman will then bring the ticket to the warehouse secretary to print the delivery ticket.
- The warehouseman will place the delivery ticket and all packages from stock order on a pallet and moves it to the delivery area.
- Driver goes to delivery area and pulls the delivery tickets for the school they will be delivering to.
 - Check the paperwork to make sure they have the right location and number of packages.
 - Loads onto truck.
- Driver delivers packages to the correct location and gets signatures on delivery tickets. One copy is left at the school/location and one copy is brought back to the warehouse.
- Driver gives their paperwork to the warehouse secretary.
 - All delivery tickets are scanned and saved for future reference.

Safety

Truck drivers are responsible for their truck. They are to keep them clean and make sure they are in good working condition (including, but not limited to, lights, oil, tire pressure, etc.). Drivers are to report any issues to the Material Control Coordinator.

All warehouse employees are responsible for the equipment used in the warehouse (forklifts, shrink wrap machine, scrubber, etc.) to make sure they are in good working condition. Warehouse staff is also responsible for basic housekeeping (sweeping, mopping, keeping uncluttered, etc.) on the warehouse floor to make a safe work environment.

All employees should report all injuries at the time and location that it happens. If the injury happens at another location, it needs to be reported at that location and to the Material Control Coordinator.

If drivers are in an accident of any kind, it should be reported to the Material Control Coordinator immediately. The driver is also asked to take pictures at the accident site.

APPENDIX A

School Board Policies

DJE – Purchasing

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=CAV7G4197FEC>

DJED – Bids and Quotations

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=CAUJ374B2BBA>

DFI – Lease of School Lands

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3NN2T583A2F>

DFM – Sale of Surplus Equipment and Supplies

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3NMW25970D3>

DFN – Sale of Buildings and Land

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3NU4N620911>

EDBA – Responsibility for Vehicle Operation

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3PKB34FE58C>

DE – Debt Management

<http://go.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3NLUS54670E>

Note: All APSB Policies are located on the BoardDocs portal at:

<http://www.boarddocs.com/la/apsb/Board.nsf/goto?open&id=B3LTNG6A517B>

APPENDIX B

Louisiana Department of Education’s Methods of Procurement – Quick Reference Guide

Louisiana Department of Education

Methods of Procurement – Quick Reference Guide

Procurement Methods	Federal Requirement Uniform Grants Guidance Section 200.320	State Requirement Title 38 La. Bid Law R.S. 38:2212.1	State Requirement Title 39 La. Procurement Code R.S. 39:1551-1755 Executive Order: JBE 20-21	Action required
Micro Purchases	Purchases less than \$10,000 No competitive process required.	Purchases less than \$1,000 No competitive process required.	Purchases less than 10,000 No competitive process required.	Title 38 - Follow more restrictive state requirement. Title 39 – align with federal requirement.
Small Purchases (informal)	\$10,000 - \$250,000 Price or rate quotation from adequate number of qualified sources.	\$1,000 - \$30,000 3 or more quotes suggested but not required.	Purchases less than \$10,000 No competitive process required.	Title 38- Follow more restrictive state requirement. Title 39 – Follow more restrictive state requirement.
		\$30,000 - \$60,000 Solicit 3 or more quotes.	\$10,000 - \$20,000 Solicit 3 or more quotes.	Title 38 and Title 39 align with federal requirement.
			\$20,000 - \$30,000 Solicit 5 or more quotes.	Title 39 - Follow more restrictive state requirement.
Sealed Bids (formal advertising)	Exceeding \$250,000 Publicly bid and award to lowest responsible bidder.	Materials and Supplies Exceeding \$60,000 Public Works Exceeding \$250,000 Publicly bid and award to lowest responsible bidder.	Exceeding \$30,000 Advertise according to R.S. 39:1594 Refer to LA Procurement Code (R.S. 39:1551-1755)	Title 38 – Follow more restrictive state requirement. Title 39 – Follow more restrictive state requirement.
Competitive Proposals	Exceeding \$250,000 Request for Proposal from adequate number of sources; must have written method for selecting recipients.	Materials and Supplies Exceeding \$60,000 Public Works Exceeding \$250,000 Publicly bid and award to lowest responsible bidder.	Exceeding \$30,000 Advertise according to R.S. 39:1594 Refer to LA Procurement Code (R.S. 39:1551-1755)	Title 38 and Title 39 - Follow more restrictive state requirement.
Noncompetitive Proposals – Sole Source Purchases	Sole source purchases are appropriate only under the circumstances listed below. These circumstances must be adequately documented. <ol style="list-style-type: none"> 1. The item procured is only available from a single source, 2. The purchase is in response to a public emergency that will not permit a delay resulting from the competitive process, 3. The purchase is expressly authorized by awarding or pass-through agency in response to written request from LEA, or 4. After soliciting a number of sources competition is deemed inadequate. Process must be adequately documented. 			

Note: LEAs may choose by ordinance or resolution to adopt the La. Procurement Code in part or in its entirety. LEAs may also purchase from vendors with state contracts that have been pre-approved by the Office of State Procurement (OSP).

APPENDIX C

How-To Guides:

<https://sites.google.com/apsb.org/supply-chain-alio>