



PROCUREMENT SERVICES HANDBOOK

(Revised September 2024)

PROCUREMENT SERVICES DEPARTMENT

The Procurement Services Department provides a unified purchasing process that ensures integrity and fairness, with centralized responsibility for oversight of solicitation, vendor selection, negotiation, contract award, contract administration, reporting and emergency logistical support for the benefit of Kansas City Public Schools (KCPS).

The policies, procedures, and processes are meant to reflect an environment that puts KCPS in the best possible position to procure the products and services needed in a timely and cost-effective manner while ensuring appropriate business processes are followed.

OUR VISION

It is the vision of the KCPS Procurement Services Department to become an integrated, inspired and acknowledged entity within KCPS, working cooperatively with all departments to facilitate the seamless delivery of value-added goods and services.

OUR MISSION

The mission of the KCPS Procurement Services Department is to provide value-oriented public procurement and contract services in support of KCPS mission to excel in instruction, research, and community outreach.

OUR VALUES

The KCPS Procurement Services Department believes that these core values are paramount in our performance and essential to our success:

- Integrity - We embrace the highest ethical standards of our profession and model ethical conduct to our customers, our colleagues and our community.
- Innovation - We empower ourselves and others to reach beyond the current paradigm to pursue creative ideas. We value creativity and innovation in developing and providing successful solutions.
- Quality - We strive for excellence in providing quality products and superior customer service by applying continuous improvement practices and techniques that exceed our customer's expectations.
- Commitment - We are committed to ensure a fair, non-discriminatory, competitive and comprehensive procurement process that complies with applicable laws and accreditation requirements.
- Teamwork - We work cooperatively with a shared purpose and vision, and promote collaboration. We value and respect our professional relationships and solid partnerships by acknowledging the abilities, expertise and contributions presented to KCPS.

I. ROLE AND RESPONSIBILITIES OF PROCUREMENT SERVICES DEPARTMENT

A. The Procurement Services Role

Procurement Services is responsible for the management of KCPS procurement processes relating to the acquisition and delivery of goods and services necessary to sustain the academic, research and support service activities of KCPS. Procurement Services provides vital centralized supply services ensuring that:

- acquisitions are completed in a fair and equitable manner;
- procurement practices and processes are in compliance with KCPS policy, applicable government legislation and any laws and regulations governing the purchase of commodities or competitive bidding;
- standard business practices and ethical conduct is observed and upheld;
- acquisitions are made utilizing seamless methods of purchasing which facilitate easy access to ordering information for KCPS customer and provide for the necessary controls and accountability expected by KCPS and its supporters;
- purchase requests for goods and services are handled expeditiously, observing the need to meet the requirements of KCPS customer;
- goods and services are received, managed and credited in a timely and accurate manner; and
- Business partnerships and community alliances are established and fostered on behalf of KCPS and in support of KCPS vision and strategic direction.

B. Disciplines that are exempt from the standard procurement process

1. Various areas do not follow the standard procurement process. These areas include, but are not limited to:
 - a. Payment of gas, water and electric utilities;
 - b. Payroll, fringe benefits and payroll taxes;
 - c. Employee reimbursements; and
 - d. Student scholarships.

C. Contract and Service Agreement Committee

The Procurement Services Department works collaboratively with Legal Services to review initial specifications, assists the end-user in determining the mode of solicitation (IFB or RFP), and decides whether a Service Agreement or another procurement alternative would be more advantageous to KCPS. The process starts with the completion of the online Contract and Service Agreement Form.

D. Unauthorized Purchases

1. Please be advised that receiving the good or service before a valid purchase order is established is an unauthorized procurement. All purchases of goods or services requires a Purchase Order.

II. COMPETITIVE QUOTES AND BID SOLICATION

Competitive quotes and bids are required for the purchase of goods and services to ensure a level playing field, including Minority and Women-owned Enterprise (MBE/WBE) participation, on which to compete for KCPS contracts. In lieu of requesting bids, Procurement Services may elect to utilize various state, local and

other cooperative purchasing agreements when it is in the best interest of KCPS.

When competitive quotes and bids are desired, the following procedures will apply:

- Lowest and best responsible qualified bidder
 - Lowest bidder may be determined with monetary standards
 - Best bidder may involve other factors and elements
 - Honesty and Integrity
 - Skill and business judgment
 - Experience and capacity to perform and execute to completion
 - Previous conduct and performance history
 - Quality and attribute of previous work

“Lowest and best bidder” shall mean the lowest bidder whose offer, including the bidder’s qualification, best responds in quality, fitness and capacity to fulfill and perform the particular requirements set forth in the solicitation of bids.

- Purchases less than \$3,500 – Requires at least one informal quote and should be obtained by either email or fax, in accordance with KCPS purchasing procedures. However, competitive pricing (which should include one MBE/WBE), is highly encouraged and recommended. There may be exceptions, which will be considered on a case-by-case basis.
- Purchases between \$3,500 and \$50,000 – Requires at least three informal quotes (which should include one MBE/WBE), and should be obtained by either email or fax, in accordance with KCPS purchasing procedures.
- Purchases exceeding \$50,000 – Competitive bidding, such as Request for Proposals (“RFP”) or Invitation for Bid (“IFB”) are required (with limited exceptions) and must be submitted to Procurement Services for solicitation through public advertisement and approved by the Superintendent or the Board Chair.
- Construction projects, which may exceed \$50,000, must be formally bid.
- All Information Technology (IT) requests must go through the IT Department.
- All Transportation requests must go through the Transportation Department.
- All quotes must be submitted on Company letterhead or valid Company email.
- All Professional Development requests must be first approved by both Professional Development and School Leadership.
- Construction Projects may have additional requirements including advertising, competitive bidding and prevailing wage. Prevailing wage is required if over \$75,000 (if State funds are used) or over \$2,000 (if Federal funds are used).
- Please note that “construction” includes building, reconstruction, enlargement, major repair, improvement, altering, remodeling, demolition, painting and decorating.

A. Formal Bids

1. If purchase exceeds \$50,000 and involves insurance contracts, or construction which may exceed \$50,000, formal bidding, such as Request for Proposal (“RFP”) or Invitation for Bid (“IFB”) is required, except:
 - a. Where the Company is the sole source of the good or service as established in Section III Procurement Alternatives to Bidding Process by following the below referenced process;
 - b. Where another governmental agency or cooperative purchasing program has established a contract through a competitive bid process, there are cost advantages for KCPS under the contract and there is no other Missouri law that would prohibit using the contract (establishing a “piggy back” agreement) as established in Section III Procurement Alternatives to Bidding Process;
 - c. For professional services as in compliance with Section III Procurement Alternatives to Bidding Process; or
2. A formal bid is one requiring public notice and sealed bids. Formal bids will be advertised and posted once a week for two consecutive weeks.
3. For IFB’s, lowest and best (most appropriate and advantageous) is the evaluation criteria used unless there are documented justifications as to why the vendor has been disqualified. The Procurement Specialist will award the contract to the lowest and best vendor whose bid meets the specifications.
4. For RFP’s the evaluation criteria in the RFP is used to determine the lowest and best proposal to meet the needs of KCPS. The contract will be awarded to company with the lowest and best proposal as determined by the evaluation committee.
5. Formal solicitations require layered review, committee work and multiple sign-offs which require time to prepare. Ideally, the process should start approximately two to three months prior to the need to establish the contract for procuring the goods or service.
6. Formal bids are estimated, at a minimum, six (6) weeks to write, advertise, receive proposals or bids, evaluate the proposals or bids, initiate a contract for appropriate signatures and prepare the Board Item for Board approval.

B. Informal Bids (Quotes)

1. When the total purchase price or cost of the goods or services are between \$3,500 and \$50,000, the Procurement Services Department and/or end-user will conduct an “informal bid” process by soliciting quotes from at least three vendors who sell the needed goods or services.
 - a. Soliciting informal bids requires a written request for quotes with detailed specifications for the desired items or services as well as the written quotes from vendors.
 - b. The school/department should contact its assigned Procurement Specialist with its desired product and specifications. The end user may suggest a vendor and may contact the assigned Procurement Specialist to suggest other like vendors.

- c. The Procurement Specialist and/or the end-user will solicit and obtain the quotes from the vendors. The vendors must submit the quotes on company letterhead or a valid email address.
 - d. The Procurement Specialist will attach the request for quotes with the specifications and quotes to the requisition.
 - e. The Procurement Specialist will award the purchase to the lowest and best bidder who meets the specifications and process the on-line requisition into a purchase order.
2. In the event that an end-user or department has a need to conduct an immediate informal bid, the requestor may send out written detailed specifications and receive the vendor quotes directly. At least three (3) quotes must be solicited. The vendor's quotes must be on company letterhead or email with measures available to authenticate proper identification of the company.
 - a. All documentation, including written specifications and all vendor quotes must be submitted to Procurement Services with the requisition number written on the documentation.
 3. Procurement can assist the end user with obtaining competitive pricing. The end user should provide the Procurement Specialist with all price verifications on the vendor's letterhead or valid email. This includes office supplies, textbooks, library books and other commodities that are not supported by KCPS Contracts and Service Agreement.

C. Exceptions to General Solicitation Process

1. Please note that there are occasions when the general solicitation process is not applicable. In such cases, the following exceptions are listed below:
 - a. Construction projects that exceed \$50,000 must be formally bid.
 - b. Insurance contracts must be bid in compliance with applicable laws.
 - c. When KCPS awards a District-wide contract with a vendor to provide specific goods or services, those goods or services must be procured from the District-wide contract vendor. However, if the goods or services fall outside of the vendor's contract, the goods or services can be formally or informally bid as deemed necessary.
 - d. When other governmental agency or cooperative purchasing program has established a contract through a competitive process and the cost is advantageous for KCPS under the contract ("piggy back" agreement) as permitted by law and in compliance with Section III, Procurement Alternatives to Bidding Process.
 - e. Professional Services in compliance with Section III Procurement Alternatives to Bidding Process.
 - f. If the goods or services are a documented sole source and no other vendors can provide the goods or services in compliance with Section III, Procurement Alternatives to Bidding Process.

D. Supplier Diversity Procurement Program

1. KCPS objective and responsibility is to ensure that Minority (MBE) and Women-Owned Enterprises (WBE) firms have the maximum practicable opportunity to participate and compete for KCPS purchases and contracts. We influence the depth and diversity of the vendor pool by promoting fair and open access for KCPS business opportunities. Such efforts strengthen the KCPS economic vitality and assist in getting the best price and value for KCPS.
2. KCPS commitment extends to the Procurement of all goods and services, including the purchases supporting:
 - a. Federal, State or Local governments
 - b. Commercial clients, or
 - c. In-house requirements
3. Supplier Diversity participation is a KCPS commitment and is strongly encouraged in all facets of our business relationships. End users presenting service agreements and contracts to the Procurement and Contract Committee should make every effort to include diversity opportunities, if deemed appropriate.

Supplier Diversity Commitment:

Kansas City Public Schools (KCPS) and its Office of Purchasing has a longstanding commitment to creating and improving contract opportunities for Minority Business Enterprises (MBE) and Women-Owned Business Enterprises (WBE). The Office of Purchasing is dedicated to inclusiveness and diversity in its efforts to serve business owners while aligning its work to the Strategic Plan of Kansas City Public Schools.

Under the term of this program, diverse suppliers and contractors are given an equal opportunity to compete for materials and service contracts on behalf of KCPS.

III. PROCUREMENT ALTERNATIVES TO BIDDING PROCESS

A. Governmental Agency or Cooperative Procurement Program Competitively Bid Contracts – “Piggy Back” Agreements

1. If in the best interest of KCPS, Procurement Services can establish “piggyback” agreements with vendors who have current governmental agency or cooperative procurement contracts that have been competitively bid. **However, piggyback agreements should only be done as the exception and not the rule.** Please consult Procurement Services to determine whether a piggyback agreement is the best procurement alternative.

B. Professional Services

1. Professional Services are defined as services provided by a person or firm that is of a professional nature, with special licensing, educational degrees and unusual or highly specialized expertise.
2. All proposed Service Agreements or Contracts must be reviewed by the Senior Contract Specialist and Legal Department to ensure contract and procurement compliance. They will

determine what contract documentation is required and/or negotiate additional or revised contract terms if deemed appropriate.

C. Sole Source

1. A sole source purchase means that there is only one business that can provide the service, equipment or materials needed, so the attempt to obtain bids would only result in one business bidding.
2. In order to establish a sole source for a good or service and not conduct bids, a Sole Source Justification (SSJ) Form will need to be completed by the end user, with approval by the appropriate department head and Procurement Manager. The SSJ should outline the nature of the procurement and detail why the good or service should be sole sourced. However, the fair and open chance to compete is preeminent. Before you assert that a procurement is sole source, you should fairly and honestly attempt to identify multiple vendors or multiple brands.
3. Although competition is not involved, the end-user must establish that the price is fair and reasonable and document the appropriate procurement action. The end-user must provide a letter from the vendor on company letterhead describing the cause and nature of the sole source procurement. In addition, the end-user must check the vendor's qualifications, verification of insurance coverage (if applicable), information on warranty offered and any other data pertinent to the purchase.

D. Emergency Services

1. Justification for emergency procurement.
 - a. An emergency procurement shall be limited in scope and duration to meet the emergency. When considering the scope and duration of an emergency procurement, the end-user/department should consider price and availability of the good or service procured so that the department obtains the best value for the monies spent under the circumstances. The end-user/department shall attempt to acquire goods and services of general use with as much competition as practicable under the circumstances.
2. Special procedures required for emergency procurements.
 - a. In order to justify an emergency procurement, an Emergency Purchase Justification Form should be completed by the end-user, accompanied with appropriate documentation, and submitted to the department head and the Superintendent for approval and signature.
 - b. The justification shall include the following:
 - i. Good or service that is to be procured
 - ii. Cost
 - iii. The serious or urgent nature of the emergency, and the health, safety or critical business service or program that was jeopardized.
3. A purchase of this nature does not relieve the end-user from seeking three competitive quotes to negotiate a fair and reasonable price and documenting the appropriate procurement action. However, if this is a Sole-Source procurement; please attach a completed Sole Source

Justification (SSJ) Form. In addition, the end-user must check the vendor’s qualifications, verification of insurance coverage (if applicable), information on warranty offered, and any other data pertinent to the purchase.

4. These procedures are not allowed for satisfying preferences or conveniences, or for preventing funds from reverting at the end of a fiscal year or for any reason that seems to circumvent regular procurement methods. Departments must anticipate their needs for goods and services to avoid requesting emergency purchases because of inadequate forecasting or overlooked requirements.

IV. SPENDING AUTHORITY, AUTHORIZED SIGNATURES AND APPROVAL ROUTES

1. Service Agreements and Contracts may only be processed if first approved by the Senior Contract Specialist and Legal Department and given to the individual with the appropriate spending or contracting authority. Only a limited number of employees of KCPS have authority to authorize expenditures, approve requisitions or execute contracts on behalf of KCPS.
2. **End users within departments or schools DO NOT have the authority to sign ANY Contracts or Service Agreements with outside parties in the name of KCPS or one of its affiliates, departments or schools. The Superintendent and the Board Chair are the only authorized entities and therefore, must approve and sign ALL Contracts and Service Agreements before they are fully executed.**
3. KCPS current Alio approval levels are listed below:

<\$5,000	Manager/Coordinator
<\$5,000	Principal
\$5,001 - \$10,000	Director
\$10,001 - \$20,000	Executive Director
\$10,001 - \$20,000	Assistant Superintendent
\$20,001 - \$25,000	Deputy Superintendent
\$20,001 - \$25,000	Chief Officers
\$25,001 - \$250,000	Superintendent
>\$250,001	Board of Education

4. In some cases, the above officers may expressly delegate limited signature authority in writing to another KCPS employee or position. Please verify with your department to determine if a specific individual has been appointed as temporary approver or signature authorizer. Please note that approval or signature authority does not permit individuals to sign agreements or contracts. Please contact Procurement or Legal Services for additional information.

A. Board Approval Requirements

1. **All Contracts and Service Agreements** requires the following:
 - a. Signature of Superintendent or Board Chair
 - b. Board Item Number
 - c. Board approval and appropriate signatures

2. The cost of a purchase or service agreement includes the collective amount of periodic and/or regular payments to the same vendor for the same type of good, service or project. The cost includes the total of all installment payments (such as lease agreements), regardless of whether those payments are made within the same fiscal year.

B. Department Approval Requirements

1. In addition to the authorized signature(s) as listed above, certain items cannot be procured without the written authority of another department.
 - A. Technology Hardware/Software and Audio-Visual Equipment Purchases
 - i. If you would like to purchase technology hardware/software and/or audio-visual equipment, you must contact Information Technology Services.
 - ii. Information Technology Services will process your order request once it has been assessed and approved.
 - iii. Please note that the request will still go through the procurement process and approval routing for ordering.
 - iv. To view a complete list of approved technology equipment and software products, please contact Information Technology Services for an IT product catalog.
 - B. Construction Projects
 - i. "Construction" is defined by law as the erection, reconstruction, improvement, enlargement, alteration, painting and decorating, or major repair of buildings, structures, or playgrounds, and improvements of all types.
 - ii. Any expenditure for construction (even on a school site using school funds), must be submitted to the Chief Financial Operations Officer (CFOO), regardless of the cost of the project. Failure to do so may result in KCPS violating State prevailing wage laws and State bidding laws.

V. PROCUREMENT PROCESS FOR PURCHASING GOODS AND SERVICES

A. Requisition Process for End Users

1. The Alio system is the current financial system and backbone of on-line requisition and purchase order processing.
2. It is the schools and departments responsibility to become familiar with all aspects of the system that impact the requisition process. A KCPS trained employee must enter an on-line requisition to request the purchase of goods and services.
3. If you have not received training or need additional training on how to enter on-line requisitions, how to determine your budget line/account code and funds available, how to locate and select vendors, or how to approve on-line requisitions, please contact the Procurement Department to schedule a training session for you.
4. Any on-line requisition that is not entered correctly will delay the procurement of the desired goods or services.
5. Please note that it is imperative for the End User to check to make sure that the appropriate

funds are available in the appropriate budget/account line prior to entering a requisition. If this is not done, this will cause extreme delays in the procurement of the desired good or service. A valid purchase order can only be created if there is sufficient funding in the appropriate budget/account line.

6. To avoid delays, please check that all approvers have electronically approved the on-line requisition in the Alio system. Some requisitions, based on the spending authority, will require multiple electronic approvals. The End User is responsible for checking the status of the approval routing to ensure that there is no delay in the procurement of the desired good or service. If the appropriate approver(s) does not approve the pending requisition(s), it will stay in the approver's queue and cannot be processed.

Periodically, Procurement Services may cancel requisitions that have not been approved in order to keep the system clean and working properly.

7. In order to avoid delays in the processing of on-line requisitions and procurement of the desired goods or services, the on-line requisitions will need the following:
 - a. The correct Board Item number and/or contract number, entered in the appropriate field, when applicable;
 - b. The correct vendor number as listed in the Alio system;
 - c. The appropriate written documentation (i.e. Vendor Quotes, Contract/Service Agreement, Sole Source or Emergency Justification with appropriate signatures), submitted to Procurement with the on-line requisition number listed. It is the responsibility of the End User to submit the required documentation immediately after the requisition is entered into the Alio system.
8. If the requisition has the incorrect account code or is on budget hold due to insufficient available funds for any requisition line, the requisition cannot move to the approval process.
9. **Reminder:** The on-line requisition **must** be entered prior to the receipt of the goods or services.
10. The End User should use current price information on their requisitions. Please utilize the following resources to help determine current pricing information: current vendor catalogs, current district-wide contract pricing, written price quotes from vendors, etc. If you have questions on what current pricing applies, contact your assigned Procurement Specialist or vendor.

B. Service Agreement Information

1. All End Users contracting for services must use the current KCPS Service Agreement form. The Senior Contract Specialist and Legal Department must review all Service Agreements and other types of contracts or agreements. **All Service Agreements must be approved and signed by the Superintendent or the Board Chair.**
2. A copy of the Service Agreement form can be obtained by contacting the Procurement or Legal Department.

3. Regardless of the dollar amount, all Service Agreements must be approved by the Superintendent or the Board Chair and submitted to Procurement Services for processing so that a purchase order may be generated. The Service Agreement must be fully approved and submitted to Procurement Services prior to the rendering of services unless there is other adequate documentation submitted.
4. Please note that some work that is performed for KCPS is from employees and not consultants or independent contractors. The Human Resources Department must be contacted whenever a Service Agreement with an employee is considered to ensure that the individual meets the Internal Revenue Service's guidelines for an independent contractor.
5. In order for Procurement Services to process your Service Agreement and related requisition into a valid purchase order, the end-user must have the following:
 - a. Vendor number (vendor numbers are available in the Alio Vendor Master).
 - b. If new Vendor or inactive Vendor in Alio, end-user must have Vendor complete the Vendor Application forms. Current forms may be obtained from Procurement Services or available on the District's Purchasing website.
 - c. The scope of work/services.
 - d. Amount of compensation/fees, including fees for travel, lodging, meals, etc.
 - e. Certification letters for Minority (MBE) or Women-owned Enterprises (WBE), if applicable.
 - f. Requisition number written on the front page of Service Agreement.
 - g. All appropriate approval signatures.

C. District is Tax Exempt

1. Please be aware that KCPS is an entity that qualifies for In-State Sales Tax Exemption.
2. All purchases made by KCPS are exempt from Missouri sales tax.
3. A copy of the Missouri Sales & Use Tax Exemption Form Letter can be obtained from the Procurement Services Department.

CI. New Vendors

1. If an End User is interested in utilizing a new vendor for goods and/or services, the vendor must complete the Vendor Application. The Vendor Application can be obtained on the KCPS Purchasing website or by visiting <https://kcpublicschools.gob2g.com>.
2. An on-line requisition cannot be created without a valid vendor number. To determine whether or not a vendor is registered, the End-User should check the LINQ system for confirmation.

Purchasing Department Contacts
Telephone: (816) 418-7300

NAME	TITLE	PHONE	EMAIL
Ashlea Blue-Harris	Purchasing Director	816-418-7310	ablue@kcpublicschools.org
LaVera Snipes	Senior Contract Specialist	816-418-7307	lsnipes@kcpublicschools.org
Tyson Malone	Senior Procurement Specialist	816-418-7208	tmalone@kcpublicschools.org
Connie Fuimaono	Procurement Operations Specialist	816-418-7309	cfuimaono@kcpublicschools.org
Kim Mason	Procurement/Supplier Diversity Specialist	816-418-7308	kmason@kcpublicschools.org
Karen Rollins	Lead Delivery Driver	816-418-7330	krollins@kcpublicschools.org
Tyrone Hunter	Delivery Driver	816-418-7331	thunter@kcpublicschools.org