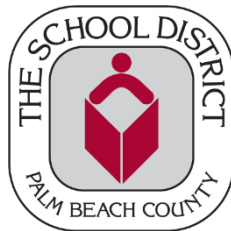


School District of Palm Beach County

PURCHASING MANUAL

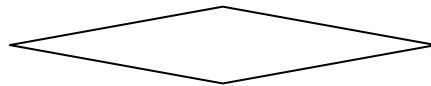


Purchasing Department

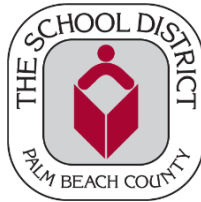
The School Board of Palm Beach County

INTRODUCTION

Matthew Jay Lane, Esq. – District 1
Virginia Savietto – District 2
Karen M. Brill, Board Chair – District 3
Erica Whitfield – District 4
Gloria Branch - District 5
Marcia Andrews – Board Vice Chair
Edwin Ferguson, Esq. – District 7



Mr. Michael J. Burke, Superintendent



The School District of Palm Beach County is an
Equal Opportunity Education Provider and Employer.



MISSION STATEMENT

The School District of Palm Beach County is committed to providing a world-class education with excellence and equity to empower each student to reach his or her highest potential with the most effective staff to foster the knowledge, skills, and ethics required for responsible citizenship and productive careers.

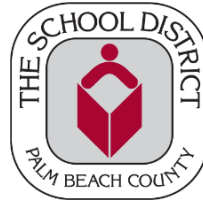
VISION STATEMENT

The School District of Palm Beach envisions a dynamic collaborative multicultural community where education and lifelong learning are valued and supported, and all learners reach their highest potential and succeed in the global economy.

GUIDING PRINCIPLES

The School District of Palm Beach County values the following principles as demonstrated through its operations, instruction, and learning environment.

Community
Cultural Sensitivity
Diversity
Equity
Ethics
Excellence
Family
Honesty
Inclusion
Knowledge
Parity
Professional Development
Professionalism
Respect
Skill Building
Social and Emotional Development
Trustworthiness



SCHOOL DISTRICT GOALS

Goal 1: Student-First Philosophy

Implement research-based fully enriched instructional models that enable students to develop the critical thinking and analytical skills necessary to succeed academically. Support each student, not as a collective unit, but with individualized educational plans. Provide meaningful follow-up, monitoring, and mentorships that provide support necessary to succeed.

Develop age-appropriate life skills training programs for students and families that cultivate soft skills including self-determination and self-advocacy.

Seek equitable outcomes for all student groups that help each student achieve the greatest success possible.

Continue and strengthen choice programs, career academies, and other career/technical curricula that meet the needs of our students while supporting the economic development goals of the community.

Implement methods to identify learning styles and match them with appropriate teaching methods

Goal 2: Family Matters

Create policies and programs that proactively engage all parents, caregivers, and families as the primary partners in the education of students.

Implement new policies, procedures, and processes to make schools more family friendly so that the school encourages parent/caregiver participation by providing: an inviting campus, a welcoming atmosphere and mutually beneficial opportunities to interact with teachers and administrators.

Train principals and teachers how to maximize interactive opportunities with families/caregivers via face-to face meetings as well as communication through technology.

Engage partners to empower families/caregivers.

Hold teachers/administrators accountable to families/caregivers for parental involvement efforts.

Create, recruit, and implement on campus volunteer opportunities in all aspects of school life for families caregivers and community partners.

Examine opportunities to improve adult literacy skills, and career/technical training offered to families/caregivers.

Encourage parental accountability for school readiness with support mechanisms that bolster families/caregivers.

Goal 3: Qualified and Highly Effective Workforce

Cultivate a fluid leadership development succession planning program that keeps good teachers teaching, strengthens classroom management efforts, and produces highly-effective academic leaders, assistant principals, principals, and administrators.

Conduct a resource allocation study evaluating socio-economic factors in the School District to identify shortfalls and inconsistencies between schools within the District, and reassign resources, including the workforce, to address equity in a *Student-First Philosophy*.

Enact a professional development program that is coupled with a system that ensures adequate pay for a well-trained workforce.

Ensure that professional development supports and strengthens choice programs, career academies, and other career/technical curricula to meet the needs of our students while supporting the economic development goals of the community.

Provide intrinsic incentives to encourage the reassignment of the best teachers—as measured by student performance and acceleration data—to underperforming classes, schools, and student populations as demonstrated by need.

Goal 4: Efficiency and Accountability

Streamline and reduce the levels of bureaucracy.

Redistribute savings and maximize limited financial resources to be applied to a *Student-First Philosophy*.

Conduct a functional audit of the District to enable the implementation of the *Student-First Philosophy* and *Family Matters* initiatives. Assess each department and its purpose, expenses, and how it serves and meets student needs.

Strengthen the balance between academic achievement and a robust student services program that will support the social, emotional, and career/technical/vocational needs of students through guidance programs following the National School Counseling Model.

Develop and report on efforts to provide students and teachers with up-to-date technology and wireless connectivity at each school campus to ensure the ability to perform and compete successfully in the global knowledge economy.

Enhance the learning environment of each campus to ensure top-notch facilities that are safe and encourage increased learning opportunities which will lead to achievement.

Seek parity in funding and resources among schools throughout the District with a focus on strengthening schools.

Develop a *School Facilities Improvement Plan* that will outline campus improvements, renovations, upgrades, and more.

Create a transparent, online reporting tool that tracks district-wide and school expenditures and performance measures.

Goal 5: Community Engagement

Develop a robust *Community Engagement and Empowerment* effort that provides meaningful opportunities for volunteers from stakeholder groups—including business, civic, and social organizations—to support the *Student-First Philosophy* and *Family Matters* efforts.

Create a multi-year, multi-faceted campaign to engage partners in creating a world class education system - demonstrate the return-on-investment economically and socially to partner organizations.

Regularly acknowledge and reward the participation of volunteers and partner organizations.

Ensure that there are role models and mentors who represent the diverse student body and relate to the students and families with whom they are working.

Ensure that principals, administrators, and teachers have professional support from the community to assist with professional development, management skills, and the *Student-First Philosophy*.

Continually reach out to community organizations—social, civic, business, faith-based, and others—to inform and recruit assistance for students and school personnel.

Explore ways to develop mutually beneficial opportunities that support community efforts such as the *6 Pillars of Florida's Future Economy* from the Economic Council of Palm Beach County.

Create and maintain an advisory council to provide advice and counsel in support of choice programs, career academies, and other career/technical curricula that meet the needs of our students while supporting the economic development goals of the community.

Goal 6: Communications Campaign

Commence with a communications strategy that targets students and families, the district workforce, external stakeholder groups, and the public.

Outline the efforts underway to create a *Student-First Philosophy* and *Family Matters* initiative and the resources available to students and families.

Highlight the best managerial practices implemented and reward staff in order to help build morale and demonstrate a commitment to the new initiatives.

Illustrate the successes of the District as well as recognize the performance gap and unmet needs within the District.

Promote a message of success and continued efforts to achieve the District's mission to attain its vision.

Ensure that the campaign includes efforts for principals, teachers, administrators, and others to become regularly engaged in social, civic, business, and faith-based organizations.

SCHOOL DISTRICT OF PALM BEACH COUNTY

KEY RESULTS

1. K-12 Literacy – All students of each racial / ethnic group will read independently on grade level by the end of second grade.
2. Algebra 1 – All students of each racial / ethnic group will successfully complete Algebra 1 prior to tenth grade.
3. Proficient in Reading, Writing and Mathematics – All students of each racial / ethnic group will be proficient in mathematics, reading, and writing as measured by FCAT and FCAT Writes.
4. School Grade Criteria – All schools will meet or exceed a school grade of B as measured by the Florida accountability system.
5. Upper Level Math and Science Courses – All schools will increase enrollment and performance of each racial / ethnic group in upper level mathematics and science courses, with a particular emphasis on underrepresented populations.
6. SAT – All schools will increase participation and performance of students of each racial / ethnic group taking the SAT, with a particular emphasis on underrepresented populations.
7. Advanced Programs – All schools will increase enrollment and performance of each racial / ethnic group in gifted, honors, advanced placement, IB and other advanced programs with a particular emphasis on underrepresented populations.
8. Dropout and Graduation Rates – All schools will decrease dropout rates and increase graduation rates for students of each racial / ethnic group.
9. Suspensions – All schools will reduce suspensions and eliminate disproportionate suspension rates among student groups.
10. Resources – All district and system offices will align efforts and resources to accomplish Key Results.

*All students enrolled in Exceptional Student Education (ESE) programs are expected to make progress toward accomplishing the key results, as appropriate to their instructional program. Students with disabilities enrolled in ESE must be given access to the School District of Palm Beach County's general curriculum and appropriate assessments as prescribed by their Individual Education Plan (IEP).

THE SCHOOL DISTRICT OF PALM BEACH COUNTY

PURCHASING DEPARTMENT

MISSION STATEMENT

The Purchasing Department is dedicated to providing professional and efficient procurement services and supports the activities of the School District, which includes: education, financial responsibility and community service, through contracting for all commodities and services; by maintaining procedures which foster fair and open competition, inspiring public confidence that all contracts are awarded equitably and economically; and by acquiring the greatest possible value and quality in the services and products purchased, with a timely delivery.

GOALS

1. **PRICING**: To purchase at the best cost available and/or to obtain the best value in the marketplace.
2. **COMPLIANCE**: To assist the Administration of the School District by enforcing District Policy, the applicable federal and state laws, Florida Administrative Code, the Florida State Board of Education Rules, and the School District's administrative rule's, procedures and guidelines concerning purchases.
3. **PROCESSING and ASSISTANCE**: To receive and analyze requisitions from schools and departments; to select purchasing method that offers the best option for any particular purchase and to prepare and manage solicitations; and to create, approve and dispatch Purchase Orders and Change Orders.

To provide and offer assistance to the schools, departments and administrators in researching needs, preparing specifications, obtaining required approvals, selecting vendors and resolving problems with orders.

4. **DEPARTMENT COMPLAINTS and VENDOR PROTESTS**: To act as a contact and intermediary between department personnel and vendors in a dispute. To investigate and resolve, at the informal level, all bid protests and other vendor complaints, when possible and to support the organization in any formal purchasing hearings or other protest proceedings as needed.
5. **INFORMATION and COMMUNICATION**: To keep a library of information on products, contracts, available vendors, laws, regulations, and other information necessary to fulfill all elements of our mission.

To meet, review and provide copies of the contracts with contract administrators and to publish memoranda and deliver to schools and departments the procurement tools, policies, procedures and standards needed to accomplish their missions.

6. **TRAINING**: To hold training sessions for personnel in the performance of their duties which relate to the purchase of goods and services for their locations.

FOREWORD

The Purchasing Department has prepared this Purchasing Manual for use by all employees of the School District of Palm Beach County, Florida. It is designed for employees involved in requesting, ordering, receiving and/or paying for and disposing of goods, services and construction needed by schools and departments. It is intended as a guide to point out the duties and responsibilities of all employees to help maintain the District's reputation for fairness and integrity.

To have a good purchasing program, all personnel involved must work as a team, and cooperation with one another is all-important. Those individuals whose duties require them to become a part of the purchasing cycle must be totally aware of the program and with the employees of the Purchasing Department who can help guide them through the purchasing process.

For efficient operation of the purchasing function, it is essential for all concerned to have a clear definition and understanding of its aims and purposes. The purpose of this manual is to point out District Policy and Procedure in respect to purchasing and to serve as a general framework within which consistent sound business decisions can be made. The policies and procedures outlined in this manual are all within the structure of Federal law, Department of Education Rule, Florida Statute, Florida Administrative Code and School Board of Palm Beach County Policy.

The purchasing function involves the purchase of materials, supplies, equipment and services at the lowest possible cost consistent with the quality needed for the proper operation of our schools and departments. To achieve this objective, the purchasing function seeks to foster as much competition as possible. In doing so, it adopts the goal of fairness to ensure that the process is open to all who want to compete for our business.

Finally, the goal of integrity is woven throughout the purchasing cycle, in order to maintain the public's trust. This goal is achieved by complying with a code of ethics and all applicable legal requirements.

Director of Purchasing
Darci Garbacz, C.P.M.
Director of Purchasing

EXECUTIVE SUMMARY

Listed below is a summary of items that are reflected in the Purchasing Manual:

- The Purchasing Department is charged with purchasing for the District the best quality of supplies, equipment and services at the lowest cost. In order to maintain economies of scale, it is necessary for this Department to combine and bid like purchases. Therefore, it is required that all requisitions over \$1000 be sent to the Purchasing Department. The assigned Purchasing Agent will review and evaluate all requisitions over \$1000 and group all like items together. This process may require a formal written Invitation to Bid (bid) or Request for Proposals (RFP) or Invitation to Negotiate (ITN) to be released by the Purchasing Department. The purchasing dollar thresholds are:
 - \$1000 is the minimum purchase order processed by Purchasing.
 - For most purchases:
 - Over \$1000 but less than \$5,000 does not require a quote, but a requisition must be sent to Purchasing for review and evaluation.
 - Over \$5,000 but less than \$50,000 must have a minimum of three competitive quotes, preferably two of those from minority vendors.
 - Over \$50,000 requires a competitive sealed bid, RFP or ITN to be released by Purchasing.
 - Certain purchases are exempt from competition and do not require competitive solicitations.
- A blanket purchase order issued for over \$5,000 must be against a current contract.
- Visit our Website at <https://www.palmbeachschools.org/purchasing>.
- Bids, RFPs and ITN's are available to view and print at no charge on <https://www.bidnetdirect.com/palmbeachschools>.
- To help the Schools and Departments purchase supplies, equipment and services, the Purchasing Department will periodically release Contract Information regarding certain contracts. This information may include, but not be limited to, contract number, vendor name, vendor contact person, contract term, prices, etc. These documents are posted on the Purchasing Department web site, <https://www.palmbeachschools.org/purchasing>.
- Acquiring excess and obsolete equipment and furniture from Property Redistribution is now available by accessing the new e-surplus auction website at <https://www.publicsurplus.com/sms/palmbeach.fl/browse/home>. Items are available for reuse within the District before being released for purchase by the public. Items requested for reuse within the District are acquired and delivered at no cost to the school/department.
- Over 500 forms are available on the Records Management Electronic Forms web page <https://www2.palmbeachschools.org/formssearch/?>. Contact the IT-Applications Support and Quality Assurance Department at 434-7480 or PX 47480 with any questions about this web page. The District warehouse stocks forms, such as receipt books, pre-numbered continuous forms and forms printed in large volume for cost efficiency.

TABLE OF CONTENTS

<u>Chapter</u>		<u>Pages</u>
1	Purchasing Department Purchasing Staff Code of Ethics	1-1 1-4
2	Duties and Responsibilities Purchasing Department Principals and Department Heads All District Personnel	 2-1 2-2 2-2
3	Purchasing Requirements and Thresholds	3-1
4	Purchases Exempt from Competition	4-1
5	Typical Purchases That Require Additional Information or Special Handling Before Processing Computer Equipment and Software Office Furniture Food Medical Supplies Facilities Personal Items Printing Requests Forms	 5-1 5-1 5-1 5-1 5-1 5-1 5-1 5-1 5-2
6	Requisitions Purpose Pre-Planning Requisition Do's and Don'ts Requisition Preparation	 6-1 6-1 6-2 6-3
7	Specifications Definition Authority for Specifications Types of Specification Specifications Do's and Don'ts Preparation and Review of Specifications	 7-1 7-1 7-1 7-3 7-3
8	Sole Source and Emergency Purchasing Sole Source Procedures Emergency Purchase Procedures	 8-1 8-2

<u>Chapter</u>		<u>Pages</u>
9	PeopleSoft System Procedures	
	Conditions Applicable to Requisition Approval	9-1
	Payment Processing of Blanket Purchase Orders	9-1
	Often Asked Questions	9-1 – 9-7
10	Multimedia Services	10-1
11	Purchase Orders	11-1
12	Purchases from School's Internal Funds	12-1
13	Contracts for Consultants	
	Consultant Procedures	13-1
14	Contracts	
	General	14-1
	Types of Contracts	14-1
	Origin of Contracts	14-1
	Use of District Contracts	14-2
	Contracts / Agreements	14-2
15	Competitive Sealed Bids	
	Purpose	15-1
	Definition	15-1
	Procedures	15-1
	Processing Times	15-2
	Determination of Non-Responsive	15-2
	Determination of Non-Responsible	15-3
	Confidentiality	15-3
	Conflict of Interest	15-4
16	Request for Proposal (RFP)	
	Purpose	16-1
	Authority	16-1
	Definitions	16-1
	Procedures	16-1
	Evaluation Committee Policies and Procedures	16-3
	Conflict of Interest	16-7

<u>Chapter</u>		<u>Pages</u>
17	Blanket Purchase Orders	
	Definition	17-1
	Types of Blanket Purchase Orders	17-1
	Procedure	17-1
	Ordering of Goods and Services	17-1
	Approving Blanket Purchases Orders for Payment	17-2
	Completing Closing Out	17-2
18	Acceptance	18-1
19	Vendor Performance	
	General	19-1
	Noncompliance	19-1
	Importance of Vendor Performance File	19-1
	Vendor Evaluation	19-2
20	Cooperative Purchasing	
	General	20-1
	Authority	20-1
	Types of Cooperative Purchasing	20-1
	Procedures	20-2
21	Disposition of Surplus	
	General	21-1
	Methods of Disposal	21-1
	Allocation of Proceeds	21-2
	Sales to Employees	21-3
	Security of Property	21-3
	Documentation	21-3
	Disposal of Grant-Funded Equipment	21-3
	Excess, Obsolescence & Scrap Policy	21-3
	Property Redistribution Procedures	21-4
	Procedures for Use of E-Surplus Auction	21-5
22	Purchasing Forms	22-1
	General	
23	Warehouse and Pony	
	Warehouse Requisitions in PeopleSoft	23-1
	Special Requests for Mail Delivery Service	23-2
	Bulk Mail Procedures	23-3
24	Purchasing Card Procedures	24-1
25	Construction Purchasing	25-1

Appendix

Board Policies <https://www.boarddocs.com/fl/palmbeach/Board.nsf/Public>

- 6.14 - Purchasing Department Policy
- 3.22 - Standards of Conduct for Former School Board
Members and Employees
- 6.07 - Internal Accounts
- 6.142 - Diversity in Business Practices
- 6.17 - Purchasing for School Food Service
- 6.19 - School Purchases of Graduation Supplies &
Yearbooks

Commodities by Purchasing Agent

Definitions

Form 3A Interest in Competitive Bid for Public Business

Non Conflict of Interest Forms