

QUICK REFERENCE TIPS

- For more specific purchasing requirements refer to Regulation DJE-R
- Requisitions which have been rejected by one of the approvers or the Purchasing Manger must be activated, corrected, and released back into workflow or activated then deleted. This should be done immediately upon notification of the rejection.
- The reason for a rejection can be found under the notes portion of the requisition.
- Once a requisition has been converted to a PO changes can only be made by the Purchasing Department.
- To cancel or change a PO, an email must be submitted to the Purchasing Department's Bid Technician with a copy to the approving administrator. The email should outline, in detail, the reason for the change or cancellation. Please be sure funds are available before making your request. You will be notified once the requested change has been made.
- **With few exceptions, a purchase should never be made prior to generating a formal purchase order.**
- PPA funds allocated each fiscal year are for that particular year's students and should be spent accordingly.
- The Open PO Report is an excellent tool for monitoring your outstanding PO's. It is highly recommended you run this report quarterly to review the status of your outstanding purchases. This will enable you to follow-up appropriately on those items which have not been resolved in a timely manner. You may access the report as follows: Financials > C. Purchasing > C. PO Inquiry and Reports Menu > C. Standard PO Reports
 - Choose Encumbrance by PO Number
 - Choose Define
 - Be sure to select Detail
 - Be sure you have not selected include zero balance PO's
 - Enter your Dept/Loc Range
 - Green Check
 - To view only, click on the Display Button
 - Print report by clicking on File > Output > Landscape > OK

VENDOR PERFORMANCE EVALUATION

Every effort should be made to resolve conflicts and complaints directly with the vendor. If this is not successful, the Purchasing Department will assist you in reaching a satisfactory resolution on behalf of the District. You are urged to complete a **Vendor Service Report**, which can be downloaded from the Purchasing website: [Financials > Purchasing > Purchasing Forms](#). This form may be used to document problems and/or exemplary service experienced while working with a vendor.



Rockdale County Public Schools

Empowering Students. Shaping the Future.

PURCHASING DEPARTMENT POCKET GUIDE FY'2023

**Purchasing Department
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www.rockdale.k12.ga.us**

The Purchasing Department operates under the Division of Financial Services and is the central procurement arm for Rockdale County Public Schools. Our mission is to provide best practices in the purchase of goods and services through fair competitive processes and support to each school and central office department. We do this in accordance with Board policies and state laws governing educational procurement.

Our goal is to obtain the highest quality supplies, materials, services, and equipment at the lowest possible cost and in the shortest period of time from responsible vendors. This is accomplished through the issuance of Request for Quotations (RFQ), Invitation for Bids (IFB), and Request for Proposals (RFP), as well as local, federal, and State of Georgia contracts.

PROCUREMENT PERSONNEL

| | | |
|--------------|------------------------|--------------|
| Marki Dixon | Director of Purchasing | 770.860.4295 |
| Patty Potter | Lead Bid Technician | 770.860.4289 |
| John McGhee | Warehouse Supervisor | 770.860.4292 |
| Edell Davis | Mail Courier | 404.569.0920 |
| Todd Laird | Print Shop | 770.860.4353 |

PURCHASING PROCEDURES/LIMITS

If goods or services to be purchased are not being secured from a vendor who is part of a Cooperative Purchasing Agency, the following guidelines apply:

- A. Purchases of **\$1,000 or less** shall be made based on best value and the least expense to the District.
- B. Purchases from **\$1,001 to \$10,000** may be made at the school/department level provided two (2) written quotes are obtained and documentation of award justification is maintained by the school/department (purchaser) and available for periodic audit by the Chief Financial Officer (or designee).
- C. Purchases from **\$10,001 to \$25,000** require three (3) written quotes secured by the school/department and approved by the Purchasing Department. Quote specifications must be submitted by the school/department to the Purchasing Department with no less than one (1) week turn-around time. The Purchasing Manager (or designee) will review the quotes to determine best value/price. Upon award, the purchaser will be notified of the successful vendor/contractor and may proceed with the purchase. Copies of the documentation of award justification will be maintained by both the purchaser and the Purchasing Department and be available for periodic audit by the Chief Financial Officer (or designee).
- D. Purchases greater than **\$25,000** will require a **formal solicitation**. The Purchasing Department is responsible for the administration of all formal solicitations with only a few exceptions. When a formal solicitation is not administered by the Purchasing Department, it becomes the end-user's responsibility to maintain compliance with all procedural requirements regarding formal solicitations, including but not limited to documentation and award justification. Formal solicitations will be posted to the RCPS website as well as the GPR.
- E. Construction Contracts - See Administrative Regulation DJE-R

EXCEPTIONS TO BIDDING PROCEDURES

Use of competitive solicitation is not required for the following:

The purchaser should include written explanation for why the purchase was excluded from the bidding procedures, if required.

1. **Academic Prerogative** – Products and services specific to achieving curriculum and academic standards as determined by District personnel including textbooks, reference materials, instructional media, teaching aides, testing materials and products, academic software, training, and curriculum based professional services may be purchased at the discretion of the Chief Academic Officer.
2. **Cooperative Purchases** – Goods and services offered through other governmental sources, including but not limited to state bid contracts and cooperative purchasing agreements, are considered to be the result of proper competition and may, therefore, be purchased without the use of competitive solicitation.
3. **Emergency Purchases** – In the case of an emergency, the Superintendent or authorized designee shall have authority to purchase goods and services to the extent of the emergency. An emergency situation is one in which if not accomplished immediately would (a) result in jeopardizing the health or safety of students and/or staff, or (b) to prevent interruption of the instructional program, or (c) when delay would cause irreparable harm to the District. Supporting documentation shall be maintained by the designated District official. Emergency purchases of \$50,000 or greater shall be reported to the Board at the next work session or regular meeting.
4. **Professional Services** – Contracts for professional services shall be awarded in the manner best suited to allowing a full assessment of professional abilities and other relevant criteria, while also ensuring an open and fair selection process that engenders public confidence. Competitive bidding will seldom be the best method for selection of professional services.

The term "professional services" means services that require:

- A. A degree in a particular professional field;
 - B. A license from a state oversight board or similar authority; or
 - C. The exercise of specialized skill, knowledge, creativity, or technical abilities.
5. **Service Agreements** – Agreements for maintenance service from the original vendor or authorized agent of the installed equipment or products.
 6. **Standardization** – Additional purchases of same or like goods or services required in order to maintain consistency, produce visual harmony, or reduce financial investment and simplify administration.
 7. **Sole/Single Source** – Purchases from an only known source of supply may be made provided reasonable justification has been submitted and approved (Form DJE1.11).
 8. **Utilities and Fuel** – Because of the fluidity of these markets, quotes shall be taken periodically to assure best price and service is obtained.