Back to School
August 20, 2021
Strategic Sourcing and Contracts
Welcome and Thank you for Attending!

Introduction
As stewards of taxpayer dollars, each department within San Diego Unified School District is responsible to conduct procurements in a deliberate, fair, and ethical manner.

The goals of the Strategic Sourcing & Contracts Department are:

• To procure goods and services at the lowest cost for the best value in accordance with Public Contract Code and California Education Code.
• Eliminating risk in transaction.
• Safeguarding fair and competitive solicitations for contractors, bidders, and proposers who provide the goods and services to the students, staff, and administration.
STRATEGIC SOURCING AND CONTRACTS (CONTRACTS AND PURCHASING)

Department Purpose and Mission

Purpose:
The purpose of the Strategic Sourcing and Contracts department is to procure goods and services at the lowest cost for the best value in accordance with Public Contract Code and California Education Code, all the while, eliminating risk in the transaction, and safeguarding fair and competitive solicitations for contractors, bidders and proposers who provide the goods and services to the students, staff and administration of San Diego Unified School District.

Mission:
We achieve our mission by dedication to excellence in customer service, providing avenues of access to businesses, processing orders in a timely manner, streamlining operations, pursuing cost savings, identifying new sources of supply, developing relationships with small, minority, and women-owned vendors, and complying with all laws of the State of California.

If you need assistance or have questions, please contact Andrea O’Hara, Strategic Sourcing and Contracts Officer 858-522-5808 or aohara@sandi.net

What Should I buy on Amazon?

- Goods valued at less than $500
- Books
- Item not under current contract with the District

What shouldn’t I buy on Amazon...where should I go instead?

- Items under contract with:
  - Staples (all office supplies)
  - Waxie (all janitorial supplies)
  - Arey Jones (computer related items and supplies)
  - School Specialty Supply (all School Supplies),
  - Grainger (tools etc....)
  - HD Supply (tools, etc....)
  - Fischer Scientific (science supplies)
- Toners and Inks for printers/copiers
- 8.5” x 11” White Copy Paper.
Personal Protective Equipment (PPE)

RECOMMENDED PPE CHECKLIST

- Disposable face masks
- Reusable student face masks
- Reusable adult face masks
- Face shields
- Disposable gowns
- Disposable gloves
- Thermometers
- Pump bottles of hand sanitizer
- Wall mounted hand sanitizer dispenser
- Air Purifiers
- Student desktop barriers
- Safe Distancing Decals
- Isolation Tent
- Portable Sink Soap
- Baby Wipes (Cleaning)
- Microfiber towels

PPE SUGGESTED USAGE SHEET IS LOCATED ON THE BELOW GOOGLE LINK

https://docs.google.com/spreadsheets/d/1oqHryiQ4BZpKsenCNYE_vYI5cjW_NQFc/edit#gid=588572312
Procurement Processing

Note: When procuring (buying) goods and services under a federal award, the district must follow federal procurement policies. Purchases above $10,000 must have at least 2 quote attached to the request.

**Shopping Cart**
- Special requisition
- Punchout catalog
- Inventory items

**Requisitioning**
- Vendor
- Item description/Item#
- Valid budget chartfield
- Correct deliver location
- Obtain 2 written quotes for

**Approval**
- Department approvals
- SS&C reviews requisition
- Req sourced to PO
- PO dispatch
eProcurement
Special Request Do’s and Don’t’s

Item Description (250 Characters): Always type as much detail as you can about the item you’re ordering.

1. Always begin with the noun for the item and include the item number.
2. Type the noun for the Item. (Examples: Chair or Book or Lamp or ICA or Term)
3. Then type the item’s Make. (Examples: Acme or Safco or IBM)
4. Then type the item’s Model. (Examples: ISBN or Item/Part Number or A2B3C4 or Deluxe, etc.)
5. Then type the item’s Color, Size, etc. (Examples: Gray 24” aluminum base)
6. Price: PRICE (UNIT or EA) without shipping or tax.
7. Quantity: Numeral indicating how many you want for each Unit Of Measure (UOM).
8. Category: Service, Good or Asset. IT IS CRUCIAL that this is correct!
9. Unit of Measure: Abbreviation indicating how the item comes packaged.
10. Example UOMs: EA (each) or SET (set) or GL (gallons)
11. Due Date: Depends on what you’re ordering.
12. For Goods: For stock orders type in the current (today’s) date. All others...two weeks into the future.
13. For Services: Type in the date service is to be completed by.
14. Vendor: Name of business or person you are buying that item from.

Additional Information:
- First always type your own name and phone.
- Include any additional details about the item you’re ordering that you could not fit into the description.
- Attach back up files such as quotes, registration forms, contracts, lot lists etc..
- See ePro Quick Reference Guide
You’ll know you’re ordering a **Service** item if the following is true:

- The item is non-tangible; that is, you can’t actually touch it with your hand.
- The item is a task or series of tasks being performed by a non-district employee, such as an outside contractor. **An example would be if you were hiring a vendor to teach juggling on site, using an ICA.**
- For payment purposes, one lot of service for the total dollar amount is preferred.

**Example of Wording in Additional Information field:**
ICA Agreement for consultant(s) instructing staff and students in six (6) kindergarten classes at Freese Elementary with a theater-literacy project from 5/15/11 - 5/29/11, at a cost of $50.00 per hour for a maximum of $2,000.00. Please contact Jane Doe at 555-1212 for clarification or questions.
You’ll know you’re ordering Asset item if the following is true:

- The item is worth $500 or more per unit.
- The item is a Good (a physical item, not a service).
- The item is non-consumable (it can’t be eaten or used up).
- The item, while not an Asset by itself, is related to an obvious Asset item.*

*For example, if you order a $650 bookcase and it costs $75 to ship it, then the $75 shipping fee is considered part of the Asset item and should be entered as such on the requisition. (Shipping fees must be entered as separate line items).
Lifespan in Manage Requisitions

There are two ways to see the Request Lifespan in Manage Requisitions:

1. Expand the arrow to the left of the Requisition Line.
2. Use the Select Action Drop Down to the right of the Requisition Line.

The links will be active on the Lifespan arrow. For instance, Requisition, Approvals, and Purchase Order links are active, and you can click on them to drill into more detail.
Receiving Requirements

Confirming Process for Orders Directly Delivered to Sites (Not Direct Connect/Punchout)

- Send receipt confirmation e-mail to supctrec@sandi.net
- Reference PO number and vendor name in e-mail header
- Verify order received in e-mail statement
- Process ensures accuracy and expedites payment

Confirming Process for Term PO’s

- Send e-mail to supctrec@sandi.net with invoice attached
- Reference PO number and vendor name in e-mail header
- List invoice number in e-mail statement.
- Attached invoice must have PO number listed
- Invoice must have confirmation signature
Confirming Orders

A confirming order happens when there is a District purchase for goods or services that is placed without the issuance of an approved requisition and purchase order.

The requisition is then issued after the purchase, and the purchase order confirms the purchase.

Confirming orders are against District policy (Administrative Procedure 2415, Section C.4)

If you violate the policy above and you must use the invoice to issue the E-Pro/Requisition.

- Start Description with: CONFIRMING ORDER.
- Issue the E-Pro/Requisition to match the invoice.
- Create a line for each item and shipping, include the description on each line.
- DO NOT ADD A LINE FOR TAX ON THE E-PRO/REQUISITION. PeopleSoft calculates the tax automatically.
- Enter the correct vendor on the E-Pro/Requisition.
- If the Vendor is new, enter vendor name, address and contact information.
- Attach a copy of the invoice to the requisition in the comments of line one. (1)
Contracting and Procurement can be a confusing topic to navigate. To better help navigate these processes, please review the SDUSD manual to understand the "WHY" of contracting. **Contracting & Procurement Manual.**

If you have a question about Contracting or Purchasing, reach out to a Strategic Sourcing point of contact (POC). [POC LIST]

**NEW- CONTRACT INTAKE FORM LINKS**

To ease the burden of contracting, various contract intake forms have been created to streamline the information collected from users.

**SUPPORTING INFORMATION TO ASSIST WITH CONTRACTING**

A. [Not sure if you can hire a Contractor, complete this HR questionnaire](#)
B. [Federal Procurement Requirements, EDGAR FAQs](#)
C. [Board Meeting Due Dates](#)
D. [Guide to Bidding and Contracting](#)
E. [Price Cost Analysis Form](#)
When Do I Need a Contract?

- A company or vendor wants the district to sign a document.
- When there is an agreement, contract, or MOU that infers an obligation, an accepted offer, or an exchange for goods or services for money or other considerations.
- If a purchase requires a vendor/contractor to be on district property for an extended period of time.
- When a vendor/contractor is interacting with children for a long period of time, possibly unsupervised.
- You want to spend money to hire a person or company.
- Power to contract can be executed **only by Strategic Sourcing and Contracts Officer and Chief Operations Officer**.
- All contracts **MUST** be approved by the Board of Education in a public meeting.

Why is a Contract Important?

1. They serve as a record of commitments for both parties.
2. Agreements prevent conflicts and mitigate risk.
3. They help an entire organization maintain compliance.
4. Agreements serve as a collaboration and communication tool.
5. Agreements can help generate a Return on Investment.
6. They increase operational efficiency.
7. Agreements extend a company’s brand and values.
Contract Intake Forms

CONTRACT INTAKE FORMS

Below are the various types of contracting methods available to School Sites and Departments.

1. **School Site Independent Contractor Services**
   - ASB Funds only
   - No formal limit
   - Must follow ASB procedures and policies

2. **Private School Services, Stipends, Fee Reimbursements**

3. **No Cost Partnership Services**

4. **General Services and other Public Agency Agreements**
   - All funding types
   - Less than $96,700 in expenses

5. **Professional Services**
   - All funding types
   - Non-General services
   - Typically greater than $96,700 in expenses
NEW- Independent Contractor/ General Service Agreement Process

- **ASB Funded Services – Independent Contractor Process**
  - No dollar threshold, follow the ASB polices
  - Complete the DocuSign Agreement before submitting an intake form.
  - [https://docs.google.com/document/d/1q9Smzo7vTpiEcZSN7X98aaQ3LYlG-ZcB1ApYeIrkI/edit](https://docs.google.com/document/d/1q9Smzo7vTpiEcZSN7X98aaQ3LYlG-ZcB1ApYeIrkI/edit)

- **General Service and Other Public Agency Agreements**
  - General Services under $96,700 for the term of the Agreement
  - [https://docs.google.com/document/d/1CBFwvU7D8QDSelvHqHWIHZ-Of1NCC5Ls8NDB3UyP-8/edit](https://docs.google.com/document/d/1CBFwvU7D8QDSelvHqHWIHZ-Of1NCC5Ls8NDB3UyP-8/edit)

***These two agreement processes have replaced the one-page fillable ICA document. They remove the $10,000 cap and allow the school sites to complete the ASB Agreements first, before being routed to the SS&C department for board approvals.
The Role of a Contract Representative (CR)

- District Employee representing the department or school that requests to enter into a Contract.

- The Contract Representative is the point of contact for the fully executed contract and serves as the primary interface between the contractor and the district.

- Responsible for communicating performance and evaluation of contractual duties.

- Complete accurately the Contract Intake Form, Attach a scope of Work, Check Board Docs for previous work performed by the consultant/professional.

The Role of a Contract Specialist (CS)

- The district employee who will coordinate, negotiate, and administer the contract procurement process.

- Organize, prepare and maintain contracts, and assist in clarifying scopes of work, prepare and submit purchase requests.

- They know and communicate applicable laws, policies, and procedures.

- Bring forward to the BOE the Agreement for approval.

- Create contract files in PeopleSoft.
Open Discussion

Q & A