



ED PARKER, CPPO, CPPB
DIRECTOR OF PURCHASING,
PROPERTY RECORDS, AND
WAREHOUSE SERVICES

CHERYL HOOD, CPPB
SUPERVISOR OF PURCHASING

PURCHASING BUYERS

FF&E Purchasing Specialist

- Lisa Kesecker, CPPB, FCPA

Senior Buyers

- Ignieris “Neri” Lopez
- Gladinette “Gladi” Cabrera Vazquez
- Audra “Renee” Rodriguez
- Loni Vanbenthuisen
- Melanie Lachmiller
- Daniel Munoz

- Michelle Holmes – Bookkeeper

- Alexandra Castro – Buyer 1

For a list of which commodities they handle go to:

<https://www.osceolaschools.net/Page/2043>

OBJECTIVES

The Purchasing Department performs the centralized purchasing function for all the District's departments and schools under the authority of the School Board. Policies and procedures governing the District's purchasing program are uniform District-wide and are in compliance with all applicable Federal, State, and School Board rules and regulations.

QUOTE/BID LIMITS

- If the commodity or services is provided through a term contract (bid), you must use the awarded companies. If not covered by a bid the following applies:
 - Less than \$5,000.00 = 1 written quote
 - \$5,000 - \$49,999 = 3 written quotes
 - \$50,000 + = Formal, competitive sealed solicitation

PURCHASES NOT COVERED BY A BID

- All purchases are tracked and combined when purchased through the OSC TERMS, OIA TERMS, General Budget P/Cards and Internal P/Cards.
- If the combined dollar amount approaches \$50,000.00, a bid must be prepared and awarded for purchases that exceed the \$50,000.00 Bid threshold.

DISTRICT ISSUED PURCHASING CARD (P/CARD) USE

- Always use the established bids and contracts when they exist
- We have an obligation to the awarded vendors
- JLA
- Insurance Requirements
- Bonding
- References have been checked
- Remember, we have already determined that we as a District exceed the \$50,000.00 threshold, therefore the law requires that those purchases be made through a bid company.

REMINDER!

PROHIBITED PURCHASES WITH A P/CARD

- No computers, printers, software, subscription, licenses, textbooks, memberships, to name a few.....

It is your responsibility to make sure that you are receiving the correct discounts and bid pricing when using your P/Card

KNOW YOUR LIMITS.....

P & T/Card's \$999.00 STL/ \$5,000, \$10,000, or \$20,000 Monthly Limit

Talk to Cheryl if more than \$999.00 is needed for Travel "only"

If you are not sure if the P/Card is allowed for the purchase, then you should call or email me to verify.

SDOC RESOURCES

SDOC Resources – Purchasing Information – General Documents,
Category: Current Purchasing Documents, click on “Category”

<http://resources.osceola.k12.fl.us/PI/SitePages/Home.aspx>

- Greenbook Master, do not print as it changes often
- Dell Specifications
- Warehouse Catalog
- Etc....

REQUISITIONS:

- In order to make the requisition process work smoothly please be sure that you include your purchasing justification on your requisitions. Such

as:

- The Bid Information (SDOC-24-B-XXX-XX, B/A 1/1/24 – 1/1/25 or the State Contract Information)
 - Lowest of Three Quotes
 - Bids Waived
- Check your Rejected Requisitions often

PROPERTY RECORDS PERSONEL

- Michelle Holmes, Property Records Technician, ext. 65515
- Edwin Cotto, Property Records Lead, ext. 65514
- Jessica Lamboy, Property Records Clerk, ext. 65516

PROPERTY RECORDS LABELS



Fixed Asset Amount is \$1,000 and over...
this includes donations and internal account
purchases

*It is your responsibility to place all of the
Property Record Labels on the equipment as
soon as your facility receives them.*

PROPERTY RECORDS INVENTORY SCHEDULE



- Property Records Department will e-mail the Administrator and support staff prior to your facility's inventory date. At this time :
- *You must start to do your.....* **Pre-Inventory**
- If any of your students, teachers or administrators have taken any of the District's equipment home please have the Borrowers Responsibility form completed and on hand at the time of your inventory.
- Have the proper paperwork for any inventory removed from your department or facility.
-

PROPERTY RECORDS

ALL DONATED ITEMS REQUIRE BOARD APPROVAL

Please make sure when accepting a donation of a vehicle, trailer or any similar items that are titled, that you first contact Property Records and me so that we #1 verify that the title given to you is the most current and #2 that we get the titles transferred timely and properly in the District's name. ALL TITLES ARE KEPT IN THE PURCHASING DEPARTMENT.

HELP!



- **Call or Email Property Records Department if you need any additional information!**



SURPLUS

No surplus items should ever be disposed of prior to pick up by the warehouse staff.

Warehouse staff cannot pick up your surplus without proper paperwork being completed and submitted by you. Please review the Warehouse Procedures Manual for the proper procedures for surplus items.

COMMUNICATION

- Questions, call us, we are here to help!!!!!!!
- Your hard work and dedication to the District shows so keep doing what your doing!!!!!!



CONTRACT SERVICES TRAINING

The School District of Osceola County, Florida
Student Achievement – Our Number One Priority

Revised 01.02.2024

INTRODUCTIONS

Edward Parker, CPPO, CPPB

Director of Purchasing, Property Records & Warehouse

Cheryl Hood, CPPB, FCCP

Supervisor of Purchasing

Lissett Rodriquez

Contracts Secretary

Cecilia Gonzalez

Secretary III



- What is a contract and why do we need one?

- A contract is an Agreement with specific terms between two or more parties in which there is a promise to do something in return for a valuable benefit known as consideration, signed by all parties and enforceable by Law.
- A contract protects the School District's interests and provides legal avenues in the event of default by the Vendor.

Contract Language (must meet the following requirements)

School Board Rule 7.70.I.C.3

Contracts Must:

- A. Provide adequate financial protection;
- B. Comply with Code of Ethics (F.S. Chapter 112); and
- C. be consistent with the School Board's standard contract provisions.

- How will I know if a Contract is necessary?

- The determination of when a Service Agreement/Contract is needed will be initially made by the School District of Osceola County (SDOC) Purchasing Department once a contract intake form has been provided by you.
- On a case-by-case basis, Purchasing may determine that a Purchase Order would provide the necessary protection.
- NO ONE SHOULD SIGN A VENDOR CONTRACT, QUOTE, INVOICE, etc. without the prior consent from the Purchasing Department.



- When do you need a Service Agreement (Contract)?

- Examples:

- Software/Web tools (after approval from the Software Committee)
- Fundraisers (candy, cookie dough, smencils, magazines, candles, etc.)
- Rock climbing/Obstacle Courses/Carnival Rides
- Professional Development Trainings
- Author visits
- Special events (Prom, Homecoming, Military Ball, 5k's, etc.)

- If in doubt, please send an Intake for Purchasing to review your request.
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CONTRACT INTAKE FORM

[HTTPS://APP.SMARTSHEET.COM/B/FORM/617500D0644B4FF29A4349134D275413](https://app.smartsheet.com/b/form/617500D0644B4FF29A4349134D275413)

The screenshot shows the website for The School District of Osceola County, Florida. The header includes the district logo, name, and tagline "Every Child, Every Chance, Every Day!". Navigation buttons for "DISTRICT HOME" and "OUR SCHOOLS" are visible. A breadcrumb trail reads: Home > Departments > Purchasing / Property Records / Warehouse > Purchasing / Property Records / Warehouse > Purchasing and Contracts Department > Contracts Information.

The main content area is divided into three columns:

- Purchasing / Property Records / Warehouse**: A sidebar menu with a dropdown arrow. The "Contracts Information" item is highlighted. Other items include P-Card/T-Card Forms, Professional Associations, Public Auction Information, Public Notices, Publications/Manuals/Procedures, Quote Results from Trade Packages, Rules/Ethics, Single/Sole Source Postings, Vendor Information & Applications, and Staff Directory.
- Contracts Information**: A list of links with document icons:
 - Contracts Procedures Manual 8.11.21
 - Addendum to Waiver of Liability
 - Contract Insurance Requirements
 - Release of Liability Form
 - Staff Training | Contract Services Training Updated 1.5.21
- Quick Links**: A list of links with a red circle around the "Contract Intake & Transmittal Form" link.
 - Vendorlink Contracts Database
 - Contract Intake & Transmittal Form

CONTRACT INTAKE FORM

FILL IN YOUR DEPARTMENT INFORMATION. WE WILL NEED THIS TO CONTACT YOU.

1. What type of contract do you need?
2. Provide a detailed scope— what is the service or commodity?
3. When will the agreement begin and end?
4. Where will the service(s) take place?
5. Have you entered into a similar contract before? Is this a renewal? Is this an amendment?
6. What is the amount of the contract?
7. Are vendor personnel going to be on campus or around students?
8. Budget information must be completed with both Title and Strip.
9. Provide complete contractor information.
10. Did you obtain quotes, was this a bid or is it exempt?

** The more information you provide, the quicker we can complete your request**

PURCHASING'S RESPONSIBILITIES

Verify Vendor Legitimacy and Purchasing Justification

To Develop Contract Documents Terms and Conditions

Send to School/Department for review

Get necessary approvals (Signatures). Note: Schools/
Departments located outside of the District Office may be
asked to obtain vendor and principal/department head
signatures

Upload to the VendorLink Database

<https://vendorlink.osceola.org/common/searchcontracts.aspx>

Contract Administration (your responsibility)

1. Direct supervision of the executed contract (legible scanned copies are acceptable)
2. Monitoring of the agreement, receiving the deliverables, inspecting the deliverables, timelines, etc.
3. Vendor compliance with whatever you have contracted with them to do/provide
4. **Vendor clearance (background check/fingerprinting OR Direct Supervision Form from HR)**
5. Current certificates of insurance [general liability, auto and worker's comp (if necessary)].

Contract Signature Authority

School Board Rule 7.70.I.C.1:

Principals & District Level Administrators:

- A. Internal/District/Title 1/Capital Outlay/Grant Funds Less than \$5,000
- B. Internal Funds \$5,000 - \$49,999 then **approval of the Director of Purchasing, Property Records & Warehouse.**

Superintendent:

- C. District/Title 1/Capital/Grant Funds Greater than \$5,000 and Less than \$50,000

School Board:

- D. All Funds \$50,000+ and all oTECH Internship/Externship Agreements.

Contract Signature Authority (Continued)

- Assistant Principals, Guidance Counselors, Deans, Sponsors, Bookkeepers, and/or anyone under the Principal/Department Head **DO NOT HAVE SIGNING AUTHORITY** for Contract purposes.
- If your principal is out for a period of time, please send the contract to Purchasing for signature by the Assistant Superintendent of Curriculum & Instruction for your school level.

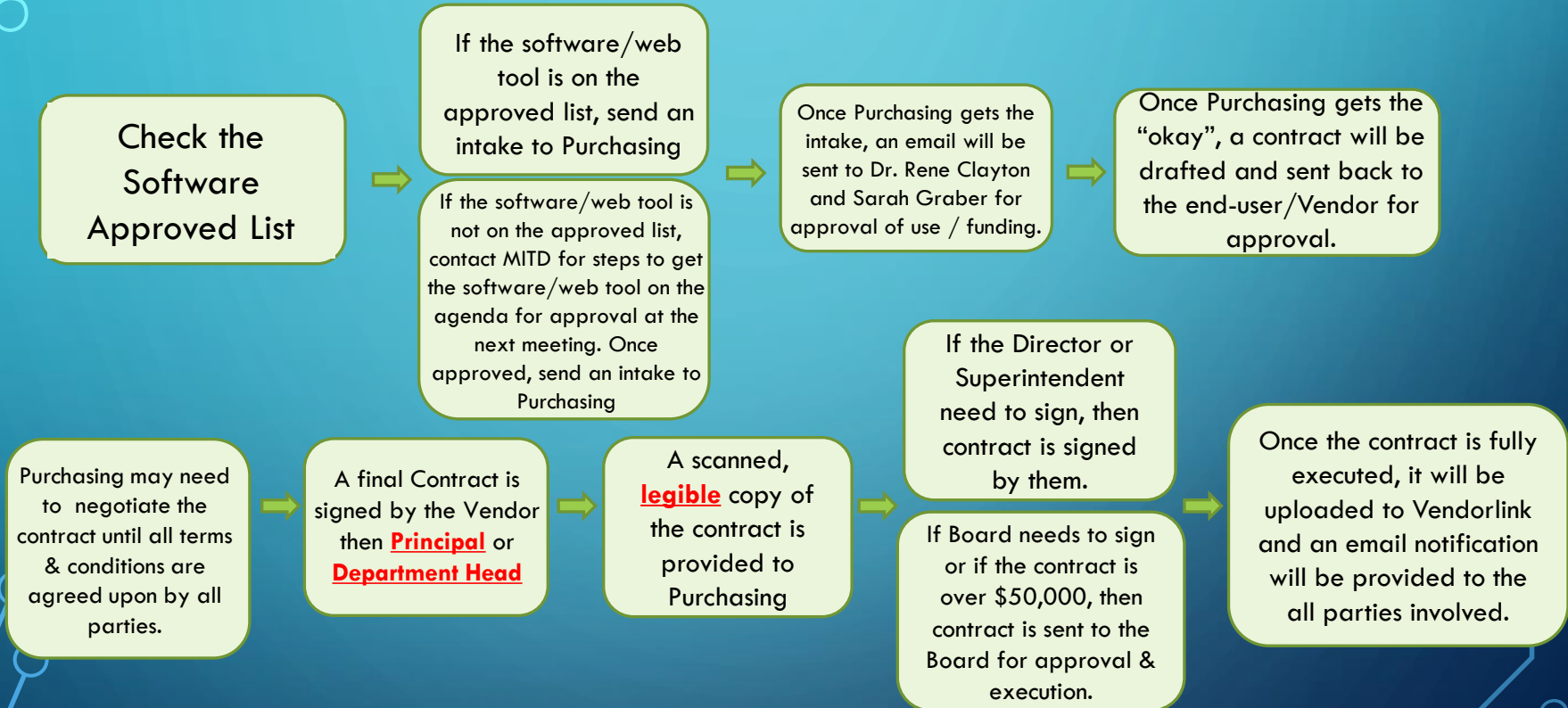
CONTRACTS – LICENSE AGREEMENT

- Software/Web Tool Contract Requests
- According to SDOC's Strategic Plan, specifically Goal 3: Fiscal Responsibility, we must optimize use of all resources to preserve and protect the taxpayers' investment.
- Strategies for fiscal responsibility include consolidating software applications and licenses.

LICENSE AGREEMENTS

- All requests for software/web tool purchases must be on the approved software list.
- Be sure to check MITD's webpage.
<https://www.osceolaschools.net/Page/1995>
- If the software/web tool is not on the approved software list, contact MITD so they can inform you on how to get your request on their agenda for approval at their next meeting.

LICENSE AGREEMENT FLOW



GRANTS

New Uniform Grant Guidelines

- Effective December 26, 2017, there have been changes to the Uniform Grant Guidelines (UGG) that affect the way purchases are secured if the district is using federally funded grant monies.
- If the district is the direct recipient of the federally funded grant monies, then the end user must provide purchasing justification (i.e. RFP, Bid, 3 quotes, sole source, etc.).

The bids waived exemption no longer applies as justification.

GRANTS (CONTINUED)

- If the district is the sub recipient of the federally funded grant monies, then the district end user has to contact the direct recipient of the grant to ensure the purchasing justification.
- The information must be sent along with your intake so that we can ensure compliance with the UGG are being adhered to prior to the draft of a contract request.

GRANTS (CONTINUED)

- **Micro Purchases ranging from \$0.01 to \$9,999.99**

When practical, distribute purchases among qualified suppliers. No quotes are required so long as Purchasing determines that the price is reasonable. Any purchase order over \$5,000.00, SDOC purchasing justification is still required.

- **Purchases In Excess of \$10,000 but Not Over \$49,999.99**

Obtain three (3) written quotes: Three (3) or more vendors shall be sent a written Request for Quote. FAX or email responses are acceptable as a written reply to this type of request. When the requests are returned, they are evaluated based on the price and specifications. The vendor offering the lowest responsive, responsible price that meets the specifications will receive a purchase order.

GRANTS (CONTINUED)

- **Purchases In Excess of \$49,999.99**

A minimum of three (3) competitive solicitations for sealed proposals shall be requested in accordance with F.A.C. 6A-1.012(7). A public bid opening shall be conducted on the date and time when bids are due. Board approval shall be required before a purchase order may be issued unless the purchase qualifies as an emergency under F.A.C. 6A-1.012(12)(e).

- **Sole Source/Single Source Commodity or Service**

A sole Source commodity or service is an item, group of items or services that only one (1) vendor can supply, under the specifications required by the District. All single/sole source purchases must be posted to the Purchasing Department website for seven (7) business days. Procurement by non-competitive proposals allows for solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply: (1) The item is available only from a single source; (2) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation; (3) The Federal awarding agency or pass through entity expressly authorizes non-competitive proposals in response to a written request from the District; and/or (4) After solicitation of a number of sources, competition is determined to be inadequate.

CONTRACTS DATABASE

Start with the School District's Homepage:

- www.osceolaschools.net
- Departments, then click on the Purchasing/Property Records/Warehouse link
- Purchasing and Contracts Department
- Contracts Information
- Vendorlink Contracts Database

- Alternative option: vendorlink.osceola.org (save this to your favorites 😊)

ADDITIONAL INFORMATION

Automatic Email Reminders:

- VendorLink will provide automatic email reminders for Insurance Expiration, Renewals and Contract Expiration.
- If you desire to renew the term of a contract, please be sure to send an intake form prior to the expiration date so we can prepare an Amendment. Otherwise, a new contract will be required.

QUESTIONS & ANSWERS

Please feel free to address any questions or concerns at this time.

We are always here to assist as needed.

If you prefer to submit your question, comment or concern via email, please feel free to email us.

Lissett Rodriquez:

Lissett.Rodriquez@osceolaschools.net

Cecilia Gonzalez:

Cecilia.Gonzalez@osceolaschools.net