

The School District of Springfield R-12



PURCHASING & DISTRIBUTION PROCEDURES

Updated July 01, 2019
(Revised September 02, 2019)

**THE SCHOOL DISTRICT OF SPRINGFIELD R-12
PURCHASING & DISTRIBUTION PROCEDURES**

TABLE OF CONTENTS

INTRODUCTION AND PURPOSE.....	3
GENERAL PURCHASING INFORMATION	3
METHODS OF PROCUREMENT.....	3
Distribution Center Requisition.....	3
Purchase Orders.....	4
Purchase Cards	5
POLICIES AND PROCEDURES.....	5
General Administrative Policies.....	5
Conflict of Interest.....	8
Ethics	9
QUOTATION AND BIDDING PROCEDURES.....	9
Quotations	9
Quotation Procedures.....	10
Bidding Procedures.....	10
Responsibilities in Bidding	10
Employee Reimbursement	12
OTHER PURCHASING INFORMATION	12
Administrator Approval of Vendor Appointments.....	12
Contracts	12
Curriculum & Instruction Related Purchases.....	12
Gift Card Purchases	12
Non Allowable Purchases	12
Sales Tax	12
Sole Source and Brand Name/Standardization Justification.....	12
Technology Related Purchases.....	14
Vendor Rebates	14
DISTRIBUTION CENTER INFORMATION	14
Distribution Center Hours.....	14
Disposal of Surplus Property.....	14
Receiving Vendor Deliveries	15
Receiving Distribution Center Requisition Deliveries	15
Move Requests	15
Mailroom	15
APPENDIX.....	18
Appendix A: Employee-Vendor Application Form	18
Appendix B: Written Quote Summary Sheet.....	19
Appendix C: Sole Source Justification Form.....	20
Appendix D: Single Source Justification Form.....	22

INTRODUCTION AND PURPOSE

The purpose of the Purchasing & Distribution Procedures document is to provide clarity and instruction for procuring the supplies, equipment, and services necessary to provide a quality instructional program for students of the School District of Springfield R-12 (District). All individuals purchasing goods or services on behalf of the District must adhere to the procedures contained herein.

All previous purchasing procedures are superseded. The procedures may be revised and supplemented as needed. The most current update shall be available on the District Webpage under Purchasing.

Consistent and/or repeated failure to comply with, or flagrant abuse of, established procedures may result in action up to and including termination of employees' authority to expend District funds and/or termination of employment.

GENERAL PURCHASING INFORMATION

The Purchasing Department facilitates the procurement of all necessary products and services for the District and complies with all Board of Education policies, Missouri laws governing educational procurement and other applicable Federal, State and Local requirements and policies.

The Board of Education has the ultimate authority and approval over District purchases. Policies related to purchasing and payments include DJF-2: Purchasing, DK: Payment Process, DN-2: Surplus District Property, FEF-2: Construction Contracts Bidding and Awards, GBCA-1: Staff Conflict of Interest, JHC: Student Health Services and Requirements and KH: Public Gifts to the Schools.

The following information is provided to assist in understanding the policies and regulations that govern the purchasing activity of the District. This document is intended to be a general overview. Information and assistance with purchasing requirements may be obtained by contacting the Purchasing Department at 417 523-0073.

METHODS OF PROCUREMENT

Methods available to District staff to purchase goods or services are generally made through MUNIS Pick Ticket Inventory Requisitions, Requisitions to be converted to a purchase order, Purchase Orders or Purchasing Cards.

Distribution Center Requisitions

The District maintains and operates a central warehouse that stocks commonly used supplies. By limiting site inventories, the District accrues several benefits including reduced funds tied up in inventory, reduced chance of purchased items becoming obsolete or unusable, more storage space at the site, and reduced chance of loss or pilferage of supplies. Bulk quantity ordering and off-site storage provides convenient and cost effective means for site and department personnel to procure commonly used supplies. Suggestions

for additions to the Warehouse stock are welcome and should be directed to the Purchasing Department. The following form is available for your use: <https://isharesps.org/websitedoc/Purchasing/WebForms/newinventoryitem.pdf>

Ordering from the District Warehouse

1. Determine items to be ordered. (See District Distribution Center Online Catalog: <http://supplycatalog.r12mail.sps.org/>)
2. Consolidate orders as much as possible. Orders are entered in MUNIS Requisition entry.
3. Determine appropriate account code for which you are charging the warehouse supply order. (For additional information regarding determination of account codes, contact the District's Business Services (formally Finance) Department.)
4. Verify adequate funds are available in the selected account to be charged.
5. Order through the District's on-line system (MUNIS- Requisition Entry). Complete a District Distribution Center Requisition. The requisition should be approved following site procedures and then electronically routed for approval and processing.
6. Warehouse deliveries to sites are made twice a week. A schedule of delivery days is published annually. Please check the following link for your site's Route Delivery Schedule: <https://www.sps.org/Page/4067>

Purchase Orders

The Purchasing Department staff assists in procuring non-stock items, as well as services not provided by District staff. The purchase order is the employee's authority from the District to proceed with the purchase and must be obtained PRIOR to an order being placed. A requisition is not authorization to proceed with a purchase. All orders for goods and services over \$999.99 must be entered on a Requisition. Employees are not to place orders for goods and services over \$999.99. Only the Purchasing Department can place orders for goods and services over \$999.99 on an official Purchase Order form. Exceptions may include registrations, entry fees (for things like entertainment parks, movies, shows, etc.), meals, scholarships, travel expenses (for things like hotels, rental cars, meals, travel tickets, etc.), and purchases from vendors who will not accept a purchase order.

The following provides a general overview of procedures for the purchase of non-stock goods or services, as well as more detailed procedures for special handling/funding.

Detailed Procedures for Entering a Requisition

1. A requisition is used as the first step in requesting a Purchase Order. Once a requisition has been approved, a purchase order will be issued.
2. Determine the item or service to be ordered. Identify the account code (budget number) to be charged.
3. Enter a Requisition
 - a. Indicate an accurate description and specifications for every item listed including brand name(s), model or catalog number(s) size, color, etc. If the number of items exceeds 10, a detailed list including unit prices may be attached

- to the requisition in Munis and the wording “Per Attached List” entered in the description field.
- b. If specifications are not clear, or incomplete, clarification will be made by the Purchasing Department.
 - c. If the item(s) ordered must be exact and cannot be substituted type “NO SUBSTITUTE” on the Requisition.
 - d. The cost of each item ordered must be properly entered as a unit price and the total will automatically calculate on the electronic request. (For estimated prices check with Purchasing Department.)
 - e. Provide any correspondence for specialty items, and/or the vendor contact, whenever possible include delivery charges, if applicable.
 - f. He/she is responsible for verifying that funds are available for the expenditure. (Available funds may be determined by review of monthly accounting reports. If the Budget Leader does not have access to view the general ledger account in Munis, a [MUNIS Permissions Request form](#) should be completed and submitted to request permission.
4. Depending on the item/service to be purchased, and dollar amount involved, additional approvals may be necessary. (Additional approvals must be obtained for all technology and equipment. All orders \$3,500.00 and above require a minimum of three quotes or bids.) A screen print of an online shopping cart is not an acceptable quote.

Purchasing Cards

A purchasing card may also be used to acquire goods or services if a vendor does not accept a purchase order, for efficiency in ordering and to take advantage of certain discounts and rebates as well as online purchasing. Purchasing cards are not intended to circumvent the appropriate purchasing, approval or payment process and are not for personal use or unauthorized purchases. Any single purchase over \$999 will require a [Limit Change Form](#) that can be found on the SPS web page under Finance, Purchasing Card Forms and submitted to the Purchasing Card Coordinator.

The above-described procedures will be used in requesting required goods or services. Other situations will require advance approval from the Purchasing Manager.

POLICIES AND PROCEDURES

GENERAL ADMINISTRATIVE POLICIES

1. Capital Projects, Capital Purchase and Controlled Supply Requests have new procedures. The intent of this process is to build the budget for special purchases or projects not funded by regular building or department budgets. Not all requests will be approved; funding is limited. Requests will be prioritized utilizing criteria including protection of District assets, growth, safety & security, and efficiency.

Work orders are to be submitted by end of September for following fiscal year purchases.

- a. Capital Projects and Equipment
 - i. Capital Projects include all major repairs and renovations that extend the life and significantly enhance the end result of the facility or grounds.
 - ii. Capital Purchases include purchases of equipment, including vehicles, where purchases are \$3,000 or greater per item. These purchases must be coded to Fund 40 Capital Outlay. A School Dude work order is required for all capital purchases.
- b. Controlled Supply
 - i. Controlled Supplies include all furniture items, cafeteria tables, and whiteboards. Furniture must be from the District approved catalog located on the purchasing website. Additional procedures are outlined on page 2 of the catalog.

Submitting Capital and Controlled Requests

- Routine building maintenance or repairs should not be requested through the capital expenditure process. These items should be submitted as a maintenance work order in Maintenance Direct (School Dude).
- Regular supplies should also not be requested through the capital process; instead these items should be paid for out of your building or department budget. For example; science room safety goggles, art supplies, office supplies, etc. are items that are solicited through the bid process and paid for out of building or department budgets.
- Technology purchases must be approved through the Technology Department regardless of funding source. This applies to major purchases as well as routine purchases throughout the year.
- Curriculum purchases must be approved through the Curriculum Department regardless of funding source. This applies to major purchases as well as routine purchases throughout the year.
- All major projects must be approved through this process regardless of funding source to ensure compliance with local, state and federal laws including Board of Education policy, Missouri Statute, local building codes, Federal Wage and Hour requirements, etc. Leaders may not independently authorize work in the District. Submit all plans through the Maintenance Direct system for approval.
- Submitting a request is similar to submitting a request for maintenance repair work or for a delivery/pickup request. For those of you who are not familiar with submitting a work order, please contact the Facilities Department at ext. 36600 for assistance. Your building or department secretary or custodian should also be familiar with how a regular work order request is submitted.
- Submit one request per entry in Maintenance Direct. Each request should be submitted individually and prioritized individually.

- Regular maintenance repair requests vs. capital planning requests: Ensure that under the “Budget Info” tab, select the dropdown menu under “Purpose” and select either “Capital Project” or “Controlled Supplies”. Don’t miss these steps! Be as descriptive as possible when filling out the request and ensure the leader indicates the priority level of the request in the description of the work (for example, Priority 3 of 5).
2. Student activity funds: See the [Financial Procedures Handbook](#) for more information.
 3. Purchases under \$3,500 do not require bids or quotes; however, a building principal or department Budget Leader (Budget Leader) may elect to do so to obtain the best price. Bids and quotes may be processed by the Budget Leader or Purchasing staff and should be kept on file by attaching the bid/quotes to the requisition in MUNIS Requisition Entry. Purchases \$1000 and above must be entered on a requisition in Munis to be converted to a purchase order.
 4. Purchases \$3,500 through \$24,999.99 require a minimum of three quotes or bids. Bids or quotes may be obtained by the Budget Leader or Purchasing staff and must be attached to the MUNIS Requisition and kept on file in accordance with the General Records Retention Schedule of the Secretary of the State of Missouri. Under no circumstances may purchases or projects be divided in an attempt to circumvent the dollar value limits requiring bids. A screen print of an online shopping cart is not an acceptable quote.
 5. Fundraising Procedures: See the [Financial Procedures Handbook](#) for more information.
 6. The District attempts to participate in cooperative purchasing programs to the extent that the items purchased meet the District’s specifications and needs. The bids taken by these cooperative organizations shall satisfy the District’s bidding requirements for the period of time the cooperative bid is accepted.
 7. Non-construction and non-renovation purchases of goods or services, where the purchase is \$25,000 or greater, shall be solicited by the Purchasing Department. All solicitation responses will be publicly opened and will be retained in accordance with the General Records Retention Schedule of the Secretary of the State of Missouri. Under no circumstances may projects be divided in an attempt to circumvent the dollar value limits requiring bids. These purchases will also require Board of Education approval before PO’s can be processed. Per BOE policy any items or combined purchases \$25,000 or greater must be approved by the BOE. To achieve approval, follow the Contracts, Bids and Change Orders process that includes emailing contracts@spsmail.org with any agreement, bid documentation, or invoice and a narrative that may be posted to explain what is being requested. Should you have any questions, feel free to contact the Risk Management Department at 33659. The BoardDocs Agenda Item Details must be

attached to the requisition in MUNIS in order for the requisition to be approved or it will be rejected.

8. For construction of District facilities, where the expenditure exceeds \$15,000, a request for sealed bids will be publicly advertised for two successive weeks in a newspaper of general circulation located in Greene County, Missouri. All bids will be publicly opened and will be retained in accordance with the General Records Retention Schedule of the Secretary of the State of Missouri. Under no circumstances may projects be divided in an attempt to circumvent the dollar value limits requiring bids. All legal notices shall be processed and retained in the Construction Management Department.
9. All contracts and agreements of any amount must be appropriately reviewed and Board of Education approval obtained. No individual has the authority to obligate the District by signing a quote, contract, or agreement without Board of Education Approval. See the [Contract Management website](#) for more information.
10. To serve as a valid supplier, vendors must provide a completed W-9 Plus form as required by the Internal Revenue Service. Local sources are preferred and utilized whenever possible. Vendors are prohibited from making sales calls directly at school sites and with District personnel unless an administrator has scheduled an appointment with the vendor.
11. In accordance with Board of Education policy DJF-2, only those situations deemed an emergency may be excluded from following the purchasing procedures.

CONFLICT OF INTEREST

1. Business shall be conducted with vendors who do not present a conflict of interest as outlined in Board Policy
2. Employees shall not accept gifts, gift cards, personal loans, entertainment or other special considerations from an individual or business organization conducting business with the District except in accordance with Board Policy. Attendance at vendor sponsored group events may be allowed with approval of an employee's immediate supervisor.
3. The District shall not purchase goods or services from any employee or family member without prior review and the written consent of the Deputy Superintendent – Operations or the Superintendent. The Employee-Vendor Application form is included (Appendix C). The Deputy Superintendent – Operations and Superintendent are precluded from purchasing from his or her own family members as defined by the District's conflict of interest policy, GBCA-1. Employees shall disclose during the purchasing process previous employment with an independent contractor or vendor involved in the quote or bid process.

4. Personal purchases may not be made from District vendors utilizing District accounts to obtain special pricing afforded the District. The use of the District's name, tax identification number, or any other means which infers District authorization to obtain a reduced price for any product or service being purchased for private use is expressly prohibited.

ETHICS

All District personnel and vendors are expected to conduct business in accordance with the following Code of Ethics statements:

1. Give first consideration to the policies, regulations and goals of the District.
2. Strive to obtain the maximum value for each dollar of expenditure.
3. Conduct business in good faith; demanding honesty and ethical practices from all participants in the purchasing process.
4. Decline personal gifts or gratuities from present and potential vendors and contractors since this can influence or appear to influence procurement decisions.
5. Grant all competitive suppliers equal consideration insofar as state or federal statute and District policy permit.
6. Promote positive vendor and contractor relationships by according vendor representatives courteous, fair and ethical treatment.
7. Enhance the proficiency and stature of the purchasing profession by acquiring and maintaining current technical knowledge and the highest standards of ethical behavior.

QUOTATION AND BIDDING PROCEDURES

Quotations

A quotation (quote) is a written price furnished by a vendor on an official form or company letterhead and include the date the quote is issued, detailed product information, and quote expiration date if applicable. Written Quotes must be obtained when the projected expenditure **of all items** is between \$3,500 and \$24,999.99. Items may not be purchased separately to avoid quote requirements. Purchases \$25,000 or greater shall be bid in accordance with General Administrative Policies identified previously. A screen print of an online shopping cart is not an acceptable quote.

A Budget Leader is authorized to request quotes or may defer the process to the Purchasing Department. The request for quotation (RFQ) may be issued verbally or in writing. Written quotes are requested from three or more vendors without advertising or otherwise complying with the requirements of the formal bidding process. The Quote Summary Sheet (Appendix A) shall be completed for use in this process and is available on the District intranet under Purchasing.

The winning quote shall represent the best value to the school District based on a combination of price, quality, delivery, terms and other important factors.

Quotation Procedures

1. The Budget Leader shall invite quotes from at least three vendors. Additional information regarding Sole Source or Single Source Providers is available under the Sole Source Provider section.
2. A screen print of an online shopping cart is not an acceptable quote.
3. When requesting quotes, the Budget Leader shall provide identical specifications to the competing vendors via email or in a letter with an RFQ.
4. All vendors invited to quote will be given a deadline to furnish the quote.
5. Except for unusual circumstances, the vendor will be required to honor the quoted price for a period of at least 30 days. Any quote submitted shall specify the time period for which it is valid. When the quotation is awarded to the winning vendor, the Budget Leader or an assistant enters a purchase order requisition into Minis. The quotation number shall be noted on the requisition.
6. All quotes shall be attached in MUNIS Requisition Entry where they will be retained in accordance with the Retention Schedule of the State of Missouri.

Bidding Procedures

A bid is a price furnished by a vendor. The bid can be used for the purchase of supplies, materials, furniture, equipment and other miscellaneous items. Bids are requested, instead of quotes, when the projected expenditure is \$25,000 or greater and can only be released by the Purchasing Department.

1. Bids for equipment and other capital items may be advertised or a more selective process may be utilized. Suppliers of such items are invited to have their names placed on a mailings list to receive invitations for bid. If an advertisement is not used, then all of the vendors on the appropriate mailing list will be invited to bid.
2. A formal Invitation for Bid (IFB) is then prepared by the Purchasing Department and sent to the bidding vendors.
3. All specifications, including the bid deadline, must be clearly detailed in the IFB.
4. Bids must be submitted by the vendor in sealed envelope no later than the announced deadline.
5. Vendors supplying hazardous materials are required to provide Material Safety Data Sheets (MSDS) from the manufacturer for all products that are hazardous. The MSDS must be provided to the end user with the product to ensure appropriate awareness and training occurs.

Responsibilities in Bidding

The following are the responsibility of the Budget Leader in soliciting a bid:

1. Construct the technical portion of the specification sheet that will be the basis for submitting a bid for services or materials.
2. Develop a list of potential bidders. If the incumbent vendor or any other interested vendor is excluded from the list, the Budget Leader must provide written rationale to the Purchasing Department explaining their exclusion.
3. Submit the completed specification sheet and list of vendors.
4. Enter a requisition using 999999 (Vendor for Bid) as the vendor and attached items 1-3 above to the requisition in Munis.

The following are the responsibility of the Purchasing Department:

1. Complete the bid package by integrating the submitted specifications sheet into the bid packet with the appropriate bidder's language.
2. Review the bids and list of vendors for clarity and consistency with purchasing policy.
3. Review the technical portion of the bid with the Budget Leader submitting the bid.
4. Assign bid number(s) and opening/closing dates.
5. Advertise the bid as per Board policy and purchasing policy.
6. Receive and secure the sealed bids.
7. Open and read the sealed bids at the appointed place and time.
8. Create a bid summary or commonly known as bid tabulation. A copy of the bid tabulation will be sent to each vendor that submitted a bid.
9. Send the bid summary to the Budget Leader requesting the bid for review and approval.
10. The bid will go to the Board of Education for approval.
11. Following approval, the Purchasing Department will contact the Budget Leader to process the Purchase Order in MUNIS.
12. The purchase order will be processed and mailed to the successful vendor.

Please note that a complete copy of every bid submitted for solicitation is kept on file in the Purchasing Department in accordance with the General Records Retention Schedule of the Secretary of the State of Missouri. The Purchasing Department is available at all times to provide guidance and assistance.

DIFFERENCES BETWEEN BIDS AND PROPOSALS

BIDS Invitation for Bids (IFB) Sealed Bids	PROPOSALS Request for Proposals (RFP) Competitive Sealed Proposals
Used for Goods or Services.	Primarily for Services or complex procurements.
Our needs are CLEAR.	Our needs are NOT clear.
Specifications are used.	Statement of Work is used. (Scope of Work)
No evaluation committee.	Evaluation Committee Required.
Awarded to the lowest responsive and responsible bidder.	Award based on criteria other than lowest cost, but cost must be a factor.
No negotiations are allowed.	Negotiations are allowed and encouraged.
At IFB opening, all pricing is disclosed.	At RFP opening, only names of offerors are disclosed.

Employee Reimbursement

See the [Financial Procedures Handbook](#) for more information on reimbursements.

OTHER PURCHASING INFORMATION

Administrator Approval of Vendor Appointments

Vendors are prohibited from making sales calls directly at school sites and with District personnel unless an administrator has scheduled an appointment with the vendor.

All purchases, contracts and agreements **\$25,000 or more must be submitted to the Board of Education for approval.** Upon receipt, appropriate legal review may be arranged.

Upon legal review and approval by the Board of Education, the bid summary, contract or agreement will be signed by the Deputy Superintendent – Operations and returned to the appropriate individual and a purchase order will be issued to the vendor.

Curriculum & Instruction Related Purchases

District policy requires standardization of curriculum & instruction related purchases. The District's Strategic Plan outlines District standards related to curriculum & instruction. The District Learning and Learning Support Departments have the responsibility of enforcing these standards. Therefore, all curriculum & instruction purchases must be approved by the Learning and/or Learning Support Departments.

Gift Card Purchases

See the [Financial Procedures Handbook](#) for more information.

Non-Allowable Purchases

Purchases of goods or services for personal purposes are not allowed. Gifts or remembrances sent on behalf of staff must be funded personally or with separate social fund accounts. Gifts or flowers are permissible only in conjunction with a building, department, or District sponsored event. Should you have specific questions, please contact the Finance Department.

Sales Tax

The District is not required to pay sales tax on products and services acquired from vendors within the State of Missouri. Any purchase approved for reimbursement will comply with the taxation requirement for purchases made with purchasing cards or purchase orders. The decision to reimburse sales tax may be made in the event of an emergency purchase or other unforeseen circumstance.

Sole Source and Brand Name/Standardization Justification

A sole source is defined as "a procurement method where only one supplier possesses the unique ability or capability to meet the particular requirements of the solicitation.

- If there is a way to draft the specifications so that more than one respondent will reply, it is not a sole source.
- The use of sole source purchases shall be limited only to specific instances which are totally justified to satisfy compatibility or technical performance needs.

The following criteria may provide assistance in determining that a purchase is only available from a sole source:

- **Licensed or patented** – supplier has a license or patent that makes them the sole provider.
- **One-of-a-kind** – there is no competitive alternatives available on the market.
- **Sole Distributor** – Supplier is the sole distributor for the region or municipality.
- **Compatibility** – must match existing brand or equipment for compatibility.
- **Replacement part** – for a specific brand or existing equipment.
- **Warranty** – sole provider of factory authorized warranty service.
- **Unique design** – must meet physical design or quality standards.
- **Emergency** – URGENT NEED for the item or service does not permit soliciting competitive bids, as outlined in BOE Policy DJF-2.
- **Other** - _____
 - If the justification for sole source is “Standardization” then additional supporting documentation must be provided. See Brand Name or Standardization Justification Form.
 - Procurements of items which the District has established a standard of designating a brand name or manufacturer or by pre-approving via a testing shall be competitively bid if there is more than one supplier for the item.

A brand name description is defined as “A name, term, symbol, design, or any combination thereof used in specifications to describe a product by a unique identifier specific to a particular seller or manufacturer that distinguishes it from its competition.”

Standardization is defined as “ The adoption of a single product or group of products to be used by different entities or all parts of one organization. (Nash, Schooner, & O’Brien, 1998)

The agency understands that:

- Use of brand name descriptions and standardization is the least preferred type of specification as it limits competition and potentially equivalent products are not considered for award.
- Procurements of items for which the District has established a standard of designating a brand name manufacturer or by pre-approving via testing shall be competitively bid if there is more than one supplier for the item.

All sole source, brand name or standardization purchases in the amount of \$3,500 or more must be approved in advance by the Purchasing Manager. A Sole Source Justification Form (Appendix C) or a Brand Name or Standardization Form (Appendix D) must be completed and approved prior to awarding a bid/quote or purchase. This form is located on the District Purchasing Department webpage under Staff Links.

Technology Related Purchases

District policy requires standardization of technology related purchases. The District's Technology Plan outlines District standards related to technology, including specifications of equipment and software to be purchased and supported at each site. The District Technology Department has the responsibility of enforcing these standards, as well as providing necessary technical support for approved equipment. Therefore, all technology purchases must be approved by the Director of Technology.

Vendor Rebates

No gift cards, rebates, reward points, or vouchers may be individually received by District employees or officials. Rebates must be remitted to the Purchasing Manager.

DISTRIBUTION CENTER INFORMATION

Distribution Center Hours

The Distribution Center is open from 7 AM to 3:30 PM daily. If someone in your building needs assistance from the Distribution Center, it needs to be completed by 3:00 PM if at all possible. Please allow enough time to complete your business in order for the warehouse to close by 3:30 PM. Exceptions can be made for special circumstances only if prior arrangements have been made.

Distribution Center deliveries are made to sites/buildings twice each week. North side sites are set up on a Monday/Wednesday route and South side sites are set up on a Tuesday/Thursday route. The specific delivery chart is available on the Purchasing and Distribution Center webpage at the following [link](#).

Fridays are set up to deliver furniture and heavy equipment that otherwise couldn't be delivered on the normal delivery routes. Fridays may also be used to schedule pickup of surplus property.

Disposal of Surplus Property:

Per Missouri Statute 177.073 and Board of Education Policy DN-2, no one may sell, donate, or scrap any District property. Policy states "When the district no longer needs property or the property is not suitable to the district's needs, the Board, by an affirmative vote of not less than two-thirds of the whole Board, may authorize and direct the sale and transfer or lease of the property in accordance with law."

District property must not be disposed of in dumpsters nor removed from the premises. State laws dictate the method of disposal of items that have been determined by the State to be hazardous waste including computers, TVs, and other electronic equipment. In addition, items that have been inventoried and capitalized by the District must be removed from District accounting records at the time the property is disposed.

Notify the Distribution Center by entering a SchoolDude move request if you have equipment or furniture that is no longer needed. Items will be picked up and stored at the Distribution Center and offered to other sites. The District periodically holds surplus sales to dispose of unnecessary furniture and equipment, most commonly online through GovDeals.com.

Receiving Vendor Deliveries

Deliveries are made only to one designated point at each site. Staff at the site are responsible to disperse items received to the appropriate department or classroom.

While staff at the site, typically the custodian or secretary, assumes the receiving responsibilities described below, the employee originally ordering the merchandise is responsible for verifying and inspecting the items delivered. The following guidelines will minimize problems associated with delivery errors:

- **Verify Delivery Site:** Ensure packages being delivered are addressed to the correct site. If item delivered is not intended for your site, do not accept it. If unintended delivery is accepted, the District can incur expenses of returning packages, etc.
- **Verify Number of Packages:** The person signing for delivery shall account for the number of packages on each P.O., verifying the number of packages agrees with the number indicated on the delivery slip, if provided. If possible, note any shortages, overages, or damages with the delivery driver.
- **Verify Contents:** After delivery, it is the responsibility of site staff to promptly verify the order for correctness and concealed damage.
- **Within a reasonable amount of time, ensure the item is in working condition.**
- **Discrepancies such as shortages, overages, damage, non-working or wrong products must be resolved with the vendor immediately.**
- **Items requested to be returned due to incorrect order or items not wanted after receipt, may incur return shipping charges and/or re-stocking fees from the vendor. Such changes are expensive and will be charged to the account used to order the materials from the original P.O.**

Receiving Distribution Center Requisition Deliveries

When receiving Distribution Center orders; verify that the number of packages received agrees with that indicated on the packing list before signing for the order. A copy of each packing list will be provided. Site staff must promptly verify the packing list against the items received and notify the Distribution Center of any discrepancy (shortages, overages, or wrong items) within seven (7) days to receive credit. Credit can't be given for items purchased with previous fiscal year funds.

Move Requests

All requests that involve Distribution Center staff to make moves on your behalf will need to be entered in SchoolDude. Due to the amount of requests received and to better serve everyone, we will no longer be able to except phone calls or emails. ALL requests will need to be entered in SchoolDude. Please be as descriptive as possible to assist the Distribution Center staff with allocating the appropriate resources to complete the request the first time. A completely empty truck is not always available and if a crew is in the area, they will stop by if there is room on a truck. The majority of time, a completely empty truck is not available unless it is specifically required. Your cooperation in providing complete descriptions will allow us to provide better service. Please be sure to include any

“need by” dates as we can have upwards of 50 or more requests at any given time. We will be as flexible as we can prioritizing move requests but this becomes extremely difficult during busy times like school start up.

MAILROOM

The mailroom is located within the Purchasing and Distribution Department and is located at the General Services Center. You can reach the mailroom at 523-0073 or 36223. Please assist us with prioritizing our work demands by communicating to the mailroom any special mailings/projects that are coming up.

Blue bag mail service is provided daily by the Transportation Department via school buses while school is in session. Do not send money via the blue bag or delivery service. This service is provided for school business only, and not for the transportation of personal materials. Do not send books in the blue mailbags. Mailbags should not weigh more than 20 pounds. Books should be delivered via the Distribution Center delivery service via a move request entered in SchoolDude. It is important that each site notify the Distribution Center of a specific delivery and pick up point.

When sending mail for inter-office delivery, please include both first and last names and complete location names. You’d be surprised how many employees with the same first name work in the same buildings. This will help us get the mail to the appropriate person more quickly. Please Do NOT use staples in sealing envelopes – tape is easier to work with. Inter-office mail is delivered, sorted, and re-distributed daily with the help of Transportation.

Mail that requires postage is metered and picked up daily by Ozark Mailing Service (usually around 2pm each day).

Presort Mailing Discount

Blue bag daily delivery service is provided by school buses so that all sites may send their daily mail to the Distribution Center for processing and provides for significant savings to the postage budget. If mail cannot be presorted, then it will be processed manually and charged the regular 1st class postage rate. A discount applies to certain types of mail pieces weighing from 1.1 – 2.0 ounces (a 21-cent discount per piece). The following are guidelines for presort mailing pieces in order for them to qualify and be read and encoded by the presort scanner:

- Mailing address must be typewritten (nothing handwritten)
- Envelopes must be letter size up to a maximum of 6 1/8” x 11 1/2”
- Envelopes must be white or very lightly colored (manila envelopes will not go)
- Up to 2.0 ounces (2 oz. = approximately 9 sheets of copy paper + envelope)
- Up to 1/4” thick
- Minimum of 5/8” H x 4” L blank space on lower right corner for barcode clearance
- Please nest envelopes that need sealing

Additional recommendations for the mailing address:

- Left aligned
- In black ink on a white background
- Clear and sharp without touching or overlapping characters
- Clearly visible in window envelopes, even when insert shifts

- Parallel to bottom edge, not slanted
- No punctuation, use spaces
- Please include return address on all mailings

Additional requirements:

- Large envelopes must be sealed. The postage machine will not seal large envelopes.
- If the envelope has a clasp, the clasp must be taped over or secured. The clasp can damage the postage machine.
- No stapled envelopes, the staples can damage the postage machine.
- Non-glossy postcards are required. The postage machine will not print on glossy cards
- You must leave room for the postage in the top right corner of the post card
- Certified letter with return receipt, green card must be filled out and attached to the back of the envelope along with the white/green receipt.

Questions may be directed to the Mail Room at 523-0073 or 36223.

Appendix A

Employee-Vendor Application Form

In accordance with the Purchasing & Distribution Procedures, the District shall not purchase goods or services from any employee or family member without prior review and the written consent of the Deputy Superintendent – Operations or the Superintendent. This form must be completed and submitted to the Deputy Superintendent – Operations 30 days prior to the purchase of goods or services.

Vendor Information:

Applicant Name _____ Date _____

Employee Name _____ Relationship to Employee (if not self) _____

Building/Department _____

Business Name _____

Additional or DBA Name _____

How long have you been in business? _____

Do you currently do business with The School District of Springfield R-12? _____

If yes, in what capacity and what location(s)? _____

Taxpayer Identification Number (choose option applicable)

Social Security # _____ Fed Id # _____

Principal Activity

Service Provider _____ Product/Merchandise Provider _____ Other Provider _____

List the principal type of service or product that is provided _____

Upon approval, the applicant shall also complete the Districts Substitute W-9 form located on the District Website under Finance. This form is also available at the following link:

<https://www.sps.org/cms/lib/MO01909182/Centricity/Domain/129/Substitute%20W-9.pdf>

Applicant Signature _____ Date _____

The School District of Springfield R-12 agrees to do business with the above named employee.

Cabinet Level Approval _____ Date _____