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Procurement Technical Assistance

Procurement regulations apply to all federal grant purchases other than salaries/benefits. A compliant Procurement and Contract Administration Procedure must be in place at the local level. You must follow your local procedure.

Process for meeting Federal Procurement:

LEA Need/Goal: Describe Need and Goals

Grant Application: Write an approvable investment in the application

Choose a Procurement Type from the below:

- **Micro-Purchase** *Micro-purchase* means a purchase of supplies or services using simplified acquisition procedures, the aggregate amount does not exceed the lesser of the entity's amount or \$10,000.
- **Small Purchase** - Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold – currently the lesser of the entity's amount or \$250,000.

*Amounts for micro-purchase & small purchase may be periodically adjusted by the federal government.

- **Sealed Bids** - Formal Advertising - Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price.
- **Competitive Proposal** - Conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids.
- **Non-competitive proposal (Sole Source)** - Procurement through solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply:
 - The item is available only from a single source;
 - The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;

- The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the non-Federal entity; or
- After solicitation of a number of sources, competition is determined inadequate.

Procurement Process Documentation:

- Type of procurement (from above five methods)
- Proof of an open and competitive process (no geographic preference)
- Document the reason for your choice of vendor – must consider cost, but you can choose based on overall best value.
- Documentation of “excluded parties” check via www.sam.gov (also known as suspension and debarment check) – To make sure the payee is not under suspension or debarment to receive federal funds.

Items to be aware of as you move through the process:

Contract Administration:

Contracted Services:

- Accurate detailed deliverables of work **as approved** in grant investment.
- Rate of pay is clearly defined.
- Invoice requirements: clear billing information and break down of charges.
- Evaluation requirements (ex. survey of teachers completed by the consultant)
- Signed by authorized employee and dated by both parties prior to start of work

Invoicing for Contracted Services:

- Do not pay an invoice with federal funds in advance of the work being completed
- Verify work billed on invoice was completed satisfactorily and per contract terms and matches the deliverable(s) in the contract. (ex. Authorized program staff signs and dates the invoice noting “Ok to Pay” and adds account code(s))
- Unit on invoice is consistent with contract. (ex. If contract defines rate of pay as per day rate – invoiced unit must be per day)
- If invoice contains charges for non-federal work or multiple federal programs, the invoice must be clearly written to be able to separate the charges

Purchase of Goods

- Follow local purchase order process
- Collect detailed receipts as required
- Packing Slips with notation of verification of receipt are maintained with expenditure packet

For information on Federal Procurement Guidelines, please reference the following citation:

[2 C.F.R §200.318– 2 C.F.R §200.326](#)

Example of Documentation for “Small Purchase” of a Contracted Service

Please note: You must follow your local procurement policy/procedure. The below method is only one example of how to comply.

Example LEA Goal

To improve practicing educator’s knowledge and skills and related to curriculum, instruction, and assessment to enhance student performance at the Middle School level.

Example of an activity to meet Goal

Provide high quality professional learning on curriculum, instruction, and assessment (i.e., engaged learning, developmentally appropriate practices, small learning communities, metacognition, formative assessment, etc.) via job embedded professional learning.

Sample Investment from Grant application

To improve educator’s knowledge and skills related to curriculum, instruction and assessment at the Middle Sch., consultant to provide job-embedded professional learning (including demo lessons, lesson study) for all teachers. Focus is on use of formative assessment to guide instruction. Costs includes consultant @ \$500. 00 per diem for 20 days over a four-month period). Total \$10,000

Determine Procurement Type

Small purchase – document choice of procurement type

Advertisement (Ran on School Spring for one week)

Keep copy of advertisement for expenditure file. School District is looking for contractor to provide 20 days (March 1, 2016 – June 30, 2016) of job embedded professional learning to teachers at the Middle School level on assessment, curriculum and instruction. Requirements include a master’s degree in education, current teacher certification, middle school teaching experience, and adult learning experience (instructional coaching a plus).

Review/Consider Responses

Keep written documentation of review and decision criteria

Vendor	Price	Previous Experience	Availability
Mary	\$10,000		March-June
MC	\$8,000		Jan-April
Beth	\$7500	Did not follow through on a previous contact	March-June

Example of Documentation for “Micro Purchase” of Goods

Please note: You must follow your local procurement policy/procedure. The below method is only one example of how to comply.

Example LEA Goal

Increase math skills of struggling students through the use of technology.

Example of an activity to meet Goal

To improve academic achievement in math of struggling students, continue to integrate technology in instruction to allow teachers to differentiate instruction to meet the needs of students who are scoring below grade level on XXX assessment.

Sample Investment from Grant application

To improve student’s achievement in math, integrate the use of Chromebooks with instruction to meet the needs of individual students, especially academically struggling students, Professional development on use provided by in-house tech. integrationist. Costs include: 10 Chromebooks plus appropriate apps and software.

Determine Procurement Type

Micro Purchase – document choice of procurement type

Review/Consider Responses

Keep written documentation of review and decision criteria

Contacted three local business that have Chrome Books for sale

- Staples \$229 /each
- Repair Computer Sales & Services \$ 250/each
- Computer Barn LTD \$249/each

Our last computer purchase was from Staples so we decided to make this purchase from the Computer Barn.