

# CHAPTER 6

## REQUISITIONS

### 1. PURPOSE

Information presented on the requisition provides the basis for the Purchases made on behalf of your school/department. The requisition serves to inform the Purchasing Agent of the needs of school/department and to fully define the material or services requested. An accurate and well planned requisition will insure the completion of an economical and timely purchasing transaction.

### 2. PRE-PLANNING

- A. Always invest a sufficient amount of time in planning and preparing your requisition for the items or services needed. Remember your requisition will determine what you will receive and how quickly you will receive it. Any additional information you supply to the Purchasing Agent will help the purchasing process flow smoothly. (I.e. suggested vendors, manufacturer or model numbers, previous purchase orders, brochures or literature, etc.) However, if a school/department has critical, complex or expensive requirements coordinate with the Purchasing Agent prior to the issuance of the requisition.
- B. The Purchasing Agent will determine the most effective method to purchase the items on your requisition. A contract may be in-place, the item may be deemed bid exempt and eligible for Direct Negotiation or it may require that the Purchasing Agent obtain formal competitive responses through an Invitation to Bid (Bid) or Request for Proposals (RFP).
- C. The formal Bid or RFP process from the time of receipt of specifications to final approval may take 90-120 days. Administrative lead time for purchasing includes preparation of the bid or proposal documents and review by the using department prior to release (mailing). The following are the **minimum days from mailing to bid opening** and minimum days on informal quotes used by the Purchasing Department;

<u>Purchasing Action</u>	<u>Minimum Days to Opening</u>
Informal Written Quote	1 - 10 Days
Sealed Bid	21 days
RFP	28 Days

After competitive Bids or Proposals are received and evaluated, a successful vendor or group of vendors is selected for award. Final approval requires School Board action on purchases which are \$250,000 or greater per vendor per fiscal year.

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D. Use the rule, "Five W's and an H," when preparing a requisition.

**Who:** Who needs it? Who will receive the goods or services? Who will administer the contract and assure compliance by the vendor? Who are the recommended vendors? Who is authorized to approve the Requisition?

**What:** What is needed? (Item, service, installation, training, warranty) What are the critical features that the school/department must have? What funds will be used to pay for the item? What is the budget estimate? What are the criteria for acceptance or rejection?

**Where:** Where must the item be delivered? Where will it be used?

**When:** When must the item arrive? When will the school/department personnel be at the location to receive the item?

**Why:** Why is the item needed? Why is the delivery time important? Why are certain features important?

**How:** How is the item to be used? How is it to be packaged for delivery?

### **3 REQUISITION DO'S AND DON'TS**

#### **A. DO**

- Use PeopleSoft (Marketplace or Special Request).
- Provide as much information as possible.
- Provide a description of functional, performance or technical characteristics, as appropriate.
- Use Attachments – Scan and attach to your requisition quotes or other pertinent data that needs to accompany the Purchase Order.
- Obtain required approvals before submitting request.
- View District technology standards at <https://www.palmbeachschools.org/it/procurement> or contact Information Technology Department for assistance or advice on technology purchases.
- If you contact a vendor, inform them you are seeking "budget estimates only" or "comparative specifications." Tell vendors competition will be obtained in accordance with School Board policies by the Purchasing Department.
- Contact the appropriate Purchasing Agent for assistance.
- View Purchasing Department All-In-One website at <https://www2.palmbeachschools.org/purchasing/All-In-One> on a periodic basis to obtain detailed ordering information.

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- Ensure that principal/department head or authorized department designee reviews and approves requisitions on a regular basis.
- Communicate the importance (i.e., grant funds, impact on instructional process) of your request. Communicate any additional information in the comment section of your requisition.

### **B. DON'T**

- Assume that Purchasing or vendors are familiar with all your needs.
- Divide requirements to fall under the competitive threshold.
- Copy specifications verbatim from a vendor's publication.
- Assume competitive requirements will be waived.
- Assume the same vendor will win the order all the time.
- Provide information to any potential bidder during the bidding process. Refer all questions to the Purchasing Agent. All bidders must be notified in writing of any changes or interpretations, and all bidders must receive the same information.
- Authorize any changes to a purchase order or contract. Changes must be made in writing by Purchasing.
- Authorize any vendors to proceed without a purchase order.
- Sign any document (agreement or contract) that binds the district.
- Obtain goods or services (if over \$1000) without a valid purchase order.

## **4 REQUISITION PREPARATION**

Requisitions are entered through the Financial Management application in PeopleSoft. The navigation is as follows:

*SDPBC Employee Portal > PeopleSoft Tile > Financials Tile > eProcurement > Requisition*

To order common items and / or access staff requests, click on *SDPBC Market Place Catalog* on the *Web* tab. To order items not found in the Market Place, order with a Special Requisition on the *Special Request* tab.

Staff members may send order requests directly to the person responsible for purchasing in their respective department. The navigation is as follows:

*SDPBC Employee Portal > PeopleSoft Tile > Marketplace Tile > SDPBC Marketplace*

Detailed job aids are available in PeopleSoft for completing order requests and requisitions.