



# Following the Procurement Process

Administrative Services  
Office of Federal Grants and Program Compliance  
Dale Butler  
Contract Review Process

# Step your way a to successful purchase!

Approved School wide Plan

Know your Budget (GL298)

Follow the District's  
Procurement Process

Contract Process



# STEPS FOR CONTRACTED SERVICES

## \$2,000.00 OR LESS

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1. Forward completed Independent Contract to Administrative Services for review

Attn: Dale Butler/Grant Manager

Go to:

<http://www.atlanta.k12.ga.us/page/227> to download an Independent Contract form

2. Contract is forwarded to the following personnel for approval:

- Assistant Superintendent for Administrative Services
- Deputy Superintendent for Curriculum and Instruction

3. Contract is forwarded to Procurement

- Upon initial review, if template is an unaltered APS template, see # 4
- If template is an altered APS template or vendor template, contract is forwarded to Legal for review and approval and then returned to Procurement for review and approval

4. Contract is reviewed and approved by Procurement Officer or Director

5. Upon approval, a PO is issued by Procurement and the contract is forwarded to the requesting department and vendor.

# STEPS FOR CONTRACTED SERVICES

## **\$2,000.00 OR LESS** Continued

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6. A process flow notification is sent to requestor via Lawson

Following the 6 steps should yield;

- Total Contract Execution
- Speedy PO Delivery
- Timely Start of Services

# STEPS FOR CONTRACTED SERVICES

## \$2,001.00 to \$25,000.00

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1. Initiator of Contract should receive four quotes  
(single or sole source approvals are not included)
2. Forward completed Independent Contract with quotes to Administrative Services, Attn: Dale Butler, Grant Manager  
Independent Contract form can be located/downloaded from the website  
<http://www.atlanta.k12.ga.us/page/227>
3. Contract is forwarded to the following personnel for approval:
  - Assistant Superintendent for Administrative Services
  - Deputy Superintendent for Curriculum and Instruction
4. Contract is forwarded to Procurement
  - Upon initial review, if template is an unaltered APS template, see # 5
  - If template is an altered APS template or vendor template, contract is forwarded to Legal for review and approval and then returned to Procurement for review and approval

# STEPS FOR CONTRACTED SERVICES

**\$2,001.00 to \$25,000.00** continued

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5. Contract is reviewed and approved by procurement.
6. Upon approval, a PO is issued by Procurement and the contract is forwarded to the requesting department and the vendor.
7. A process flow notification is sent to requestor via Lawson

Following the 7 steps should yield;

- Total Contract Execution
- Speedy PO Delivery
- Timely Start of Services

# **SINGLE/SOLE SOURCE PURCHASE REQUEST**

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- Sole source purchases are defined as those purchases of goods or services that can only be obtained from one source in the marketplace
- Such goods or services will usually be of a unique nature and have performance characteristic and/or other attributes that can only be obtained from that source
- Single source purchases are defined as those purchases of goods or services that, for a justifiable reason such as compatibility or standardization, are obtained from one source among others in a competitive marketplace
- Procurement Director will approve Single and Sole Source request before forwarding to the Superintendent for approval.



## SINGLE/SOLE SOURCE PURCHASE REQUEST

Sole source purchases are defined as those purchases of goods or services that can only be obtained from one source in the marketplace. Such goods or services will usually be of a unique nature and have performance characteristic and/or other attributes that can only be obtained from that source.

Single source purchases are defined as those purchases of goods or services that, for a justifiable reason such as compatibility or standardization, are obtained from one source among others in a competitive marketplace. These are further defined as transactions valued under \$2,000 for any item or group of items; or emergency purchases.

Date of Request: \_\_\_\_\_

To: \_\_\_\_\_

Director of Procurement Services

From: \_\_\_\_\_

Requesting Department/School: \_\_\_\_\_

Check Type of Request:

Single Source

Sole Source

Please note that any individual or company who is debarred pursuant to board policy DJEBB or who appears on any suspended, excluded or debarment list issued by the agency of the federal, state or local government (i.e. is listed as a party on the Excluded Party List System (EPLS) of the United States Government) cannot provide goods or services to Atlanta Public Schools.

*Consultant contracts over \$50k and all other contracts over \$100k will require board approval.*

Vendor Name: \_\_\_\_\_

Vendor Contact Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Total Cost of Goods / Services: \_\_\_\_\_

Date Goods / Services are required: \_\_\_\_\_

Is the company registered as a vendor with APS? \_\_\_\_\_

Yes

No

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### INFORMATION TECHNOLOGY AUTHORIZATION

Will this purchase have any IT components? \_\_\_\_\_

Yes

No

If yes, this purchase requires additional authorization by the Executive Director of Information Technology.

My signature acknowledges that I have reviewed this request and hereby authorize that this request proceed to Procurement Services for final review and approval.

Approved: \_\_\_\_\_

Executive Director, Information Technology

\_\_\_\_\_ Date



## SINGLE/SOLE SOURCE PURCHASE REQUEST

Provide the following information and attach additional sheets if required:

1. Provide a detailed description of the goods or services being requested.

2. Explain why the goods/services requested are the only ones that can meet your requirements and explain why alternatives are unacceptable. Be specific with regard to specifications, requirements, capabilities and compatibility.

3. Describe the steps taken to determine that the goods or services are single or sole source.

4. Explain why the price for the goods/services is considered to be fair and reasonable.

5. Describe the negotiation efforts, if any that were made with the vendor to obtain the best possible price.

6. Will this purchase obligate the district to this vendor for future purchases of the goods/services being requested?  
If yes, please explain.      Yes       No

7. Provide copies of supporting documentation including a letter from the vendor confirming single or sole source if available.



## SINGLE/SOLE SOURCE PURCHASE REQUEST

My signature acknowledges that I have reviewed this request and I concur that the goods/services are single or sole source.

Requested by: \_\_\_\_\_  
Name \_\_\_\_\_ Date \_\_\_\_\_

Approved: \_\_\_\_\_  
Department / SRT Executive Director \_\_\_\_\_ Date \_\_\_\_\_

Approved: \_\_\_\_\_  
Senior Cabinet Administrator \_\_\_\_\_ Date \_\_\_\_\_

Approved: \_\_\_\_\_  
Director of Procurement Services \_\_\_\_\_ Date \_\_\_\_\_

Approved: \_\_\_\_\_  
Superintendent \_\_\_\_\_ Date \_\_\_\_\_

### Instructions

1. Complete the form and be sure to provide all of the required information.
2. Print the form and obtain the required signatures.
3. Submit the form to Procurement Services.
4. The request will be reviewed by Procurement Services.
5. If approved it will be forwarded to APS legal and if not approved it will returned to the requestor.
6. Please allow sufficient time for processing the request.

### Procurement Services Use Only

Is the vendor on the Excluded Party List System (EPLC)? Yes  No

If yes the request should be returned to the requesting department/school.

Confirmed by:  Date:

# Summary

1. Know the content of your approved schoolwide plan
2. Review your budget (GL298) frequently
3. All contract request for goods and services require at least 60 days to process, prior to the date goods or services are needed.
4. For Services or items that must be formally solicited – contact procurement within 120 days of service start date.
5. Follow the contract approval process

**Note: Follow Up Often with your assigned Federal Grants Specialist**

# Question & Answer



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