



Procurement & Purchasing Guidelines

Michele Mays Procurement and Purchasing Coordinator
Phone: 601-973-8582

Tequia Odom Procurement and Purchasing Specialist
Phone 601-960-8799

Fax: 601-960-8967

Dates to Remember
Purchasing Deadline for Placing Orders
April 04, 2025 – District Funds
(1120, 1130, 1140, 2901, 2711, 2714 & 2901)
will not be available beyond cutoff date.

HELPFUL HINTS TO SUCCESSFUL PURCHASING

- Use ALL CAPS when entering requisitions in Marathon (eliminates errors in ordering)
- Provide Contact Information on all requisitions.
- All items must be listed on the LINE ITEM in marathon. Can no longer upload.
- Requisitions entered in Marathon that are listed as an **OPEN PURCHASE** order must list in line-item **Multi-Year**, if needs to roll into the next new fiscal year.
- Contact IT for all technology purchases prior to ordering.
- If you have not received your order two weeks after the purchase order is issued, CALL THE VENDOR.
- Check your Master Listing weekly.
- Check your requisition master listing report daily to determine if corrections, authorizations, or requisition that has been un-authorization needs your attention.
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- Requisitions are upgrade within 48 hours of receipt in the Procurement Department
 - Approved Purchase Orders and emailed/mailed out twice a day.
 - Between 10:00 A.M & 3:00 P.M.
- Make sure you have assigned/dated Add Vendor Form and W9 from the vendor.
- Check the Office Depot website for special JPS pricing and other listed websites for special pricing.
- Reference IB#, State Contract#, RFP#, Formal Bid# and dates approved or issued in requisition (as a line item). **Please contact vendor for current state contract information.**
- On food purchases, object code **612**, events for students, list agenda (where and what for) and date of the event as a line item. Open purchase orders for Kroger uses are no longer allowed. Only can shop one time on a Kroger or other vendors purchase order using object code 612 for special events.
 - Effective immediately when entering a requisition for use of the Kroger card (account) you must include the following information:
 - Event description (if it's a Special Function that should be noted on the requisition e.g. "District-wide breakfast for administrators"; if it's for a class activity that should also be on the requisition
 - Expected number to be in attendance.
 - It should also be noted on the receipt and POD when that is submitted for payment.
 - **No Open Purchase orders allowed effective July 01, 2021.**
 - Non-student & Non-Federal Funded food purchases: List the agenda (where event is held, what for, date, how many participants and food items goes in the line item on the Marathon requisition. The sign in sheets from the events must be attached to the POD sent to Accounts Payable. See page 6 for procedures on Federal Funded food purchases.
- Informal Bids (IB#)/Single/Sole Source effective only for that school year unless specified.

- **The Purpose of JPSD Business Office/Purchasing Department**

The JPS Purchasing Office helps students succeed by providing the necessary tools for success in the classroom. The office has two primary responsibilities:

1. **Responsibility to all students, schools, and administrative departments:** Procuring necessary supplies, furniture, equipment, and services in the required quality and quantity when needed.
2. **Responsibility to the taxpayers:** Purchasing all approved items at the best possible value while maintaining adequate records to demonstrate that this was completed legally according to prevailing laws and board policy.

Ethics Statement

As a governing agency, the Jackson Public School District adheres to strict laws, rules, and ethical practices when purchasing goods and services. Jackson Public School District employees do not accept personal gifts from suppliers, nor do they conduct purchasing transactions for personal benefit. Our District's goal is to obtain the maximum value for each dollar spent.

Guidelines and Procedures

As a governing authority, the JPSD Purchasing Office operates under the following procedures and guidelines:

- JPSD School Board of Trustees Policy Handbook, Section D – Fiscal Management
- Public Purchasing Statutes as contained in Section 31-7-13 of the Mississippi Code of 1972, Amended.
- State Auditor's Office Handbook and Department of Finance Administration (DFA)
- Federally Funded Standards and Guidelines
- House Bill 1109, effective January 1, 2018
- Senate Bill 2024, effective July 1, 2021
- Senate Bill 2371

The Purchasing Process

The Purchasing Department will determine the manner which orders for materials will be solicited based on the State of Mississippi Purchasing Laws (31-7-1) and policies set forth by the School Board of Trustees of the JPSD.

Open Market Purchases: Purchases which **do not** involve an expenditure of more than **\$5,000.00** exclusive of shipping charges. No additional purchasing authority needed. This excludes State & Federal Funds. Attempting knowingly to split orders to avoid acquiring an Informal Bid quote is circumventing the laws which are a direct violation of State of MS Purchasing Laws which can and will cause ramifications.

Effective July 1, 2013, there will be no exceptions to **After the Fact requisitions**. All requisitions must be entered prior to the date of the event or when items needed to receive a purchase order.

- **Informal Bids:** Purchases which involve an expenditure of **more than \$5,000.00 but not more than \$75,000.00** before shipping charges for one (1) year. IBs can be issued for one fiscal year (1) to lock in pricing for Uniforms, Diplomas, and Graduation supplies only. Two written signed quotes are needed from two or more different vendors quoting on identical items and quantity. The quotes may be submitted on vendor's letterhead along with the Informal Bid form from JPS showing specifications/descriptions & quantity requested by ordering entity. The quote must be signed by authorized personnel representing vendor. These quotes may be faxed or mailed to the Purchasing Department. No signature is required on email quotes; that original email must be forwarded to the purchasing office with attached quote sent from the vendor. The quotes must have exact descriptions/items, quantity and all costs are evaluated including shipping charges to determine the best and lowest bid. **IB# issued is only effective for that school year. SEE EXHIBIT 3**
- **Formal Bids:** Purchases which involve an expenditure of **more than \$75,000.00**. The School Board of Trustees must approve the bid before materials can be ordered. This process can take 8 weeks for completion. House Bill 1109 went into effect January 2018. Also see house Bill 1106 and Senate Bill 2024 which became effective July 01, 2021. For questions or directions, please call Purchasing.
- **Single/Sole Source:** Items that can only be ordered from a single vendor. The Declaration of a Single Source form must be completed in its entirety and all documentation required must be sign off on by the Superintendent and forwarded to the COO. Documents will be uploaded to the board material in Novus. The School Board of Trustees must approve single/ sole source purchases before materials can be ordered.
 1. A written justification, on letterhead, **signed by the department director** and the Declaration of a Single/Sole Source Request form, certifying that the commodity is a noncompetitive item only available from one source.

2. Supporting documentation evidencing the justification provided by the Vendor on the company's letterhead with the signature of an authorized associate or salesperson. The single/sole source request must provide research showing the SS authenticity.
 3. A history or narrative of the agency's use of a particular commodity, including whether it was first procured as a noncompetitive single source.
 4. Single/Sole Source requests are to include the history of the item or items being requested; is another item or items compatible that can produce the same results; to what extent the item or items will be used.
 5. Copies of documentation are sent to the Purchasing Department to submit board material to **Mr. Earl Burke**. The Declaration of Single Source request is submitted to the next School Board Meeting for approval. Once the Board approves a single source purchase, the approval is in **effect for that school year**.
 6. Single Source requests must be received 4 weeks prior to the School Board Meeting.
 7. A purchase order is issued after Board approval with the notation "Single/Sole Source Approval and the date".
 8. Single Source Documentation is filed in the Purchasing Department. Declaration of a Single/Sole Source Request form is located on the JPS website under Forms & Documents. **See page 37.**
- The Procurement Department is responsible for all approved Purchase Orders to be communicated to the vendors via email or mail. School/departments attempting to send purchase orders to vendors may result in a duplicate shipment.
 - Requisitions with object code 612 for food & food related items are review by the Executive Director of Business Services Mrs. Margaret Purnell before being upgraded to a purchase order. Food Service and Athletic Food requisitions are exempt.
 - Note: If your purchase before shipping charges is more than \$5,000.00, please call Purchasing at 601-973-8582 or Procurement Specialist at 601-960-87



Prioritize Jackson Businesses

Jackson Public Schools (JPS) is dedicated to supporting businesses within the City of Jackson. These local businesses are crucial to the success of our students and schools. JPS will endeavor, whenever possible, to procure goods and professional services from qualified companies within the City of Jackson. However, in our commitment to supporting Jackson businesses, we will not compromise on quality or agree to noncompetitive terms or inflated pricing. While we strive to support our local economy, we pledge to prioritize Jackson businesses when acquiring goods and professional services, ensuring excellence and fairness in our procurement processes.

We request that the JPS District prioritize vendors located within the City of Jackson when making purchases, whenever possible. This applies to all funding sources. Utilizing the internet as a tool, please search for potential local vendors who may supply the required materials. Contact these vendors to confirm their availability or inquire if they can provide the necessary materials. This approach supports the local economy and fosters community relationships.

Mississippi Department of Education Federal Funded Procurement

Jackson Public School District Federal Funded Departments

Effective January 1, 2015, Updated 2018

Procurement Plan with updated thresholds for you use in the adoption of a plan for districts compliance with USDA TITLE 7 CFR Part 3016. This part establishes uniform administrative rules for Federal grants and cooperative agreements to state and local governments.

- 1) Non-Federal Entity must use its own documented procurement procedures which reflect applicable State, Local, and tribal laws, and regulations, provided that the procurements conform to applicable Federal laws and standards.
- 2) There are different thresholds and procedures under Federal and State law, always follow the most restrictive guideline.
- 3) To comply with Federal regulations effective December 12, 2017, for purchases under \$5,000.00 school authorities must require quotes from “an adequate number of qualified sources.

- 4) Under Federal regulations, procurement in which the contract value exceeds \$250,000.00 are required to follow formal bid procedures.
- 5) Procurement of non-food and non-perishable supplies and equipment must follow State of Mississippi purchasing thresholds as they are more restrictive than Federal thresholds:
 - a) \$5,000.00 – must obtain two written quotes from at least two qualified suppliers
 - b) \$75,000.00 and above – must follow formal bid procedures; contact Purchasing.
- 6) Under state law, food and perishable supplies are exempt from state procurement procedures, federal guidelines still apply.
- 7) Procurement should be conducted in a manner that prohibits the use of statutory, in-state or local geographical preferences (except minimally processed, locally grown produce) in the evaluation of bids or proposals.

Jackson Public School District
Office of State & Federal Programs

Procedures for Purchasing Food Using Title I Funds

The purpose of Title I funds is to ensure that all children have a fair, equal and significant opportunity to obtain a high-quality education and reach, at a minimum, proficiency on challenging State academic achievement standards and State academic assessments.

The Department of Federal Programs is an integral division of the Jackson Public School District. It is the responsibility of the department to assure that Federal regulations and procedures are followed in regard to expending programs funds. It is not allowable for Title I funds to purchase food for staff meetings. However, it is allowable to purchase food for Title I parent meetings that are held during the lunch hour or after school hours (dinner) and for professional development in certain cases. All purchases must be reasonable and necessary. The Office of Federal Programs will authorize food purchases for only **one** parental event: The Annual Title I Meeting that is mandated by Federal Law. **The Annual Title I Meeting cannot be held in conjunction with any other meeting or program.**

Before any food is purchased for a meeting/workshop using Title I funds, the following documentation **must** be submitted to the Office of Federal Programs:

1. The school must seek approval from the Office of Federal Programs prior to the meeting (at least thirty (30) days prior to event).
2. Parents must be invited via an announcement with an opportunity to respond (registration form)
3. The menu or items to be purchased (number of items must be based on the number of returned registration forms) and the suggested place of purchase.
4. An agenda outlining the topic(s) of discussion, date, time, and location of meeting.
5. Registration forms to document the **who and how many persons** will be in attendance (**if children are attending, please include them on the form**)
6. Upon completion of the program, the sign-in sheets must be submitted to the Office of Federal Programs
7. Copies of all required materials must be kept on file at the school level in the principal's Title I box and the parent

Repairs to Equipment and Uniform Cleaning

- Repairs to computers, printers, scanners, and other items ordered under object 731 & 733 must be made by entering a request in Help Desk. The Information Services Technology Department Supervisor these repairs.

- Fax machines, telephones, televisions, VCR's, laminators, cassette players, record players, clocks, bells and fire alarm systems repair requests need to be entered on a work order to the Electronics Department. If internal services are unable to make repairs, contact Purchasing.
- Piano tunings are handled and processed in the Purchasing Department. Send an email to Michele Mays a requesting a repair at mmays@jackson.k12.ms.us. The email should provide the following information:
 - Identify equipment (model, make, date of purchase if possible)
 - Problem
 - Equipment location (meaning school and room equipment is stationed in)
 - Contact information (person name & phone number) mainly the office manager.
 - Always check with IT or Fix Assets to verify warranty on items.

- **Uniform Cleaning-** The following guidelines are to be followed regarding uniforms and choir robe cleaning for the school year:

Each high school will select dry cleaners within the Jackson area by requesting two written quotes from vendors of their choice. Once quotes are received, compare pricing, and choose lowest price providing no prior inadequate services has been an issue with recommended vendor. See page ten (10) for form to use for soliciting quotes. For your convenience, the form is listed on the JPS website under Forms & Documents.

- All High Schools should enter a requisition using object 430 to the selected provider for each cleaning request.

Important steps to remember:

- Schools/departments are responsible for requesting/sending an "Add Vendor Form & W-9" to vendor. Vendor updates/corrections are sent to Purchasing by requesting entity to be entered. Both documents are on the JPS Intranet under Forms & Documents. Vendor must fax or email the completed Add Vendor Form along with their W-9 and copy of their Certificate of Insurance that includes Workers Compensation (**only if vendor(s) are coming on to school District Property**) to the Procurement and Purchasing Department once completed with signature/date to fax # (601) 960-8967 or email.
- Vendor must provide pick-up and delivery service.
- Purchase Order must be issued prior to calling the vendor for pickup.
- Vendor must accept purchase orders.

***Funds must be available within the existing budget to provide cleaning services. ***

- **Repairs to Band Equipment** – The High School band directors get quotes from two local vendors before a requisition is entered in Marathon. Once quote is obtained from vendor, the office manager will enter a requisition for repairs using object 430 depending on available funds. No repair work should be done until the vendor receives an official Jackson Public School District purchase order. The district will not be responsible for any repairs done without an official Jackson Public School purchase order. Budget String: 1120-900-2644-000-430-School Location.



JPSD Dry Cleaning Quote Form
P.O. Box 2338, Jackson, MS 39225

School Name: _____

Address: _____

City/St Zip _____

Phone Number: _____

Contact Person: _____

Note: The Jackson Public School District wishes to do business with vendors that can provide pick up and deliver services up on awarding vendor with best lowest quotes possible. Thank you in advance for you interest in supplying us with your services. Must accept purchase order from the District. No exceptions!

Informal Quotes for Band Uniforms and Choral Music Robes Cleaning

Band Uniforms and choral Music Robes			
Item	Quantity	Unit Price	Extended price
Coats/Jackets			
Pants			
Shirts			
Capes			
Sashes			
Body Suits with Sequins			
Banners			
Straps			
Robes			
Stoles			
Collars			
Total			

Vendor Name: _____ Date of Expiration: _____

Address: _____

Signature: _____ Date: _____

What Object Code Do I Use?

- Object 545 -Digital Textbooks/Educational Materials online for students
- Object 546 -Non-Educational Online Subscription & Technical Services, Licenses. Etc.
- Object 337 – Professional Services, includes Medical Doctors, Lawyers, Architects, Accountants, therapists, Dieticians, System analysts, etc.
- Object 430 - Repair and Maintenance - Software Support - Extended Warranty
- Object 441 –Rental of Land & Building
- Object 442 - Rental of Equipment
- Object 443 – Other Rental (tables, tablecloths, chairs)
- Object 510 – District Travel Transportation
- Object 550 – Printing (Office Supplies) Object Code 610 (Students/teachers Supplies)
- Object 610 - Supplies and Materials/ Notary & Notary Supplies
- Object 611 – Software to be Installed by Information Technology
- Object 612 – Food purchases and food related items, object code **612**, events for students, list agenda (where and what for) and date of the event as a line item.
- Object 612 – Non-student /major food purchase event, list agenda (where and what for) and date of the event as a line item. The sing in sheets from the events must be sent along with the POD to Accounts Payable.
- Object 650 – Periodicals (Subscriptions, Newspapers, Magazines, purchased periodical update etc.)
- Object 651 – Textbooks (**STATE APPROVED**)
- Object 653 – Library Books
- Object 654 - Workbooks

- Fixed Assets/Property Accounting receives all purchase orders for object codes in the 700 category. For example, 731, 734, 735, 737, 770, 774, etc. that the District uses.
- Object **737**– Equipment/Furniture Items with a **Unit Price of \$5000.00 or More**. An Informal bid is required if items are not on State Contract, EPL or resulted from a formal bid, RFP or RFQ.
- Object **731** - Technology Equipment – Chromebook, Desk top Computers and Laptop. Must contact Information Technology (Ms. Hope Thompson). An Informal bid is required if items are not on State Contract, EPL or resulted from a formal bid, RFP or RFQ.
- **When such items are over \$5000.00 and not on the EPL, IT or State Contract**, An Informal bid is required if items are not on State Contract, EPL or resulted from a formal bid RFP or RFQ.
- **Object 734**, Printers, Mobile Carts, Smart Boards, Promethean Boards and interactive panels. Must contact Information Technology (Ms. Hope Thompson). An Informal bid is required if items are not on State Contract, EPL or resulted from a formal bid, RFP or RFQ.
- **Object 735** Digital Cameras & Camcorders cost greater than \$250.00, Weapons, Two-way Radios, TV grater that \$250.00 Lawn Maintenance Equipment, Cellular phones, chain saws, Air Compressors, Welding Machines, Generators, Band Instruments, ice Machines, Air Conditioners, appliances, Portable A/Cs, A/C Units, VCR's, DVD's, etc. regardless of cost.
- **Object 735** Laminators, Overhead Projectors, Typewriters, if over \$500.00 each
- Object 738 Access Points, Hot Spots
- Object 810 – Membership Dues and Fees
- Object 890 – Cap and Gown Rental

Object code used to enter a requisition for Stegall Notary Service

- Object 610 Notary Public Statewide Commission \$\$ amount \$25.00
- Object 610 Notary Public Bond \$\$ amount \$45.00
- Object 610 Self-Inking Seal Stamp \$\$ amount \$25.00
- Object 610 Shipping Cost \$\$ amount \$6.50
- Ordering entity must list the name of the individual who is the notary in the line item of the requisition.

When entering requisition in Marathon, please list items, the name of who the notary is for. After po has been issued, attach the pod to the notary application, send or bring it down to the Business Office to Mrs. Neefesha Graham to be notarized. Contact Mrs. Graham prior to coming at 601-973-8517

Marathon Remote Link Requisitions

Very Important Note: Purchase Orders must be issued for all purchases. No requisition can be processed without the following information. Requisitions must be entered in **All CAPITAL LETTERS** in Marathon.

Before a requisition can be enter in Marathon for processing, we must have an Add Vendor Request form along with the vendors W-9 with company's representative signatures. Both forms must be completed by the vendor that is to be added to the District's data base. These forms are posted on our JPS Intranet under Documents & Forms. Requesting School/department name, vendors name (dba), order address, remit to address, minority status, federal taxpayer identification number, signature, contact information (phone, email address & fax), etc., are all required.

1. Vendor address should be verified upon selection.
2. When a user enters a requisition, it is assigned a Temporary Requisition Number. This Temp number is in the (900,000 range). Once requisition is submitted for authorization, a Permanent Requisition Number is then assigned by the system.
3. **ALL ITEMS ARE ENTERED IN THE LINE ITEM IN MARATHON.**
4. **Uploads are to consist only of board agenda's, minutes, executive summaries, contracts, service agreements, JPS required documents, and other documents required.**
5. The first description line should contain a general description (supplies, technology equipment, professional development, maintenance, band instruments, band supplies, etc. to name a few). This information appears on Board material. If in doubt, contact Purchasing. The four description lines do not print on the purchase order. These lines are for interoffice communication. If a correction is needed on a requisition, the message is entered in the **Denied box** which can be seen in Purchase Requisition Maintenance field when it is sent back unauthorized and needs to be modified.
6. What information should be entered on my purchase requisition?
 - Attention Line: Person who the materials will be shipped to
 - vendor
 - Complete item number and description (may record item # in the Catalog Box)
 - Special Instructions, Shipping charges or Free Shipping. Etc.
 - Requisitions that are a direct result from a bid, RFP, RFQ reverse auction or informal bid, the bid or IB number, board approved date if applicable must be listed in the line item.
 - **Purchases requisition with a dollar amount that exceeds \$5000.00 that does not fall under the bid items must have documentation uploaded to the requisition prior to sending to the Marathon Remote Administration portal for approval.**

- Office Managers or Department Staff name and (Your phone number) after the line items
- Faculty (only) travel using JPS Transportation with object code 580 must complete the first four Description lines upon entering a requisition in Marathon. If you have any questions, contact the Accounts Payable at 601-960-8783. See example below for information needed to go on those four description lines.
- **Once all items are entered, ADD the shipping cost which is obtained from the vendor. Must list in the line item or say in the line item, THE VENDOR IS CHARGING NO SHIPPING. Always ask vendor for the shipping cost and include that amount in the line item or add 10% of your total order amount in the line item for shipping & handling. Failing to add shipping & handling in the line item will result in the requisition being sent back unauthorized.**
- Requisitions entered in Marathon that are listed as an OPEN PURCHASE order must list in line-item Multi-Year, if needs to roll into the next new fiscal year.
- Open purchase order must have a description in line item describing the purchase as well.
- **All TRAVEL for students and teachers - object code 510 on requisitions**

Add PO	
PO No:	0
PO Date:	01/08/2015
Amt:	0.00
Vendor:	Type Name/ID here and press Lookup <input type="button" value="Lookup"/>
Deliver To:	Type Name/ID here and press Lookup <input type="button" value="Lookup"/>
Status:	Open
<input type="checkbox"/> Multi Year PO	
Req No:	0
Req Date:	
Description:	TRAVEL/ BETTIE JONES
	JANUARY 8, 2015
Attention:	VICKSBURG, MS

- Travel/ Person name or Department or both that is traveling in the first two lines.
- Date of Travel on third line
- City and State traveling to

MS Office of Surplus Property is a government entity vendor the District may place orders without requesting quotes excluding Federal Funds being used. Contact Ms. Missy Elmore at 601-939-2050 or email missy.elmore@fgs.md.gov

7. **Open Purchase Orders & Multi-Year must be identified on the requisition in the line item. Example: OPEN PO/MULTI-YEAR DO NOT MAIL TO VENDOR or Open Purchase/DO NOT MAIL.** Purchasing will check Multi-Year PO on requisition upon becoming a purchase order so it will roll into the new fiscal year for uncompleted goods and services if applicable.
8. **Activity Funds (1150-1299 and 7320-7399) are not to be entered in Marathon Remote Link.**
9. Some requisitions/Fat Client pos are for Accounts Payable Do Not Mail – membership dues, subscriptions etc. If you have renewal form or invoice in hand, you should enter a requisition with **Accounts Payable Do Not Mail** under your line items. Once a purchase order has been issued, you can send your POD and payment information to Accounts Payable for processing payment. Requisitions entered to **JPS/** entities must have **DO NOT MAIL** in line item of requisition. **Example:** (JPS/Transportation, JPS/Teacher Resources).

10. PLEASE PLACE ALL SPECIAL INSTRUCTION IN THE LINE ITEM OF THE REQUISITION. THE SAME FOR FAT CLIENT PURCHASE ORDERS. BY NOT LISTING CORRECT SPECIAL INSTRUCTION CAN AND WILL RESULT IN AN UNAUTHORIZED REQUISITION.
11. If you have a vendor's quote, enter the quote number in the line item or **MS State Contract#, Formal Bid # or IB #**; please enter this information in the line item on requisition along with the dates of the bids, IB or approved board material that results in a purchase order request. Items that went to the board that were not the results of a bid, upload all documentation that applies to the requisition including the approved contract. By not entering this information on the requisition/purchase order line item will delay the process.
12. **Items on MS State Contract** must list the state contract #, product number commodity number OR THE Material number and full description of item on requisition in line item. **Please contact vendor for current state contract information. This information must be uploaded to the requisition or purchase order when being processed in Marathon. Failure to upload will result in requisition to be unauthorized and sent back un-processed. In the case of a purchase order entered by the, child Nutrition, Athletics, Central Warehouse will be close. All entering entities will be notified of such actions via email.**
13. Supplies, fixed asset items, (object codes 731, 734, 735, 738, 737 & 611) and software **should not** be entered on the same requisition. Separate requisitions for supplies and software. Fixed Assets items belong on a separate requisition by themselves.
14. To help simplify the technology equipment requests, email all requests to "Ms. Hope Thompson at jthompson@jackson.k12.ms.us or call extension 8612 for instructions. Computers, printers, scanners, secondary authorizations are don by Erin Mason at eclark@jackson.k12.ms.us. **Extended warranties are object 430 and both budget strings must be entered on one requisition. Exceptions: When using a State & Federal budget strings, all are paid out of one object code.**
15. Software purchases (Object 611) must be authorized (secondary) by the Mrs. Erin Mason, Information Technology.
16. Use Object code 610 for printing/binding when it is for students, teacher, or parents. Object code 550 is for other printing/binding that is **not** for students, teachers, or parents. Example: Supplies for the office such as envelopes, letterheads, business cards, etc.
17. State & Federal Funds/ Grant funds such as gear-up etc. requires secondary authorizations. Please follow up with your secondary authorizations.
18. State & Federal/Title Funds require two quotes and www.sams.gov verification uploaded to requisition before being submitted for a purchase order.

19. Discounts should be subtracted from your requisition total. (1 each 25% Discount **-25.48**) Marathon will not calculate the discount. Ordering entity will calculate the discount amount and enter the amount. See example highlighted in red.
20. Some 700 object codes will be delivered to the Fixed Asset Warehouse where they will be bar-coded before delivery to location unless items need assembling or extremely larger or vendor is required to deliver to destination.
21. Always obtain up to date pricing for items directing from the vendor (quotes) or their website.
22. If you **don't** receive your materials within two (2) weeks after purchase order is issued, please call the vendor to check on your order or orders.
23. Never order your materials with your requisition copy (Only a Purchase Order). **Do not fax, online, email or call in your orders.** If you need special handling, please note that under your ordered line items.
24. Each requisition must be treated as an order. Different purchase order numbers are assigned to each requisition. Each purchase order must have an invoice. You cannot combine requisitions into one order.
25. After requisitions have been added in Marathon & upgraded to a purchase order, you should pull a Requisition Master Listing Report. Link: Marathon, Remote Link, Purchase Requisition Maintenance, Requisition Master Listing and Click on Filter. This report will show you what status your requisitions are in. PO assigned or in open status, or has it been authorized or unauthorized. A message highlighted in orange will inform you if you have denied requisitions. A message will appear in the denied comment box stating why requisition was returned unauthorized. This is an especially important report and should be monitored often throughout the week.
26. **Effective January 06, 2020**, Central Warehouse and Child Nutrition Warehouse will start back revising purchase orders that their department has entered in Marathon. These two departments will make any changes/revisions within the JPSD policies, procedures and state statutes. All set procedures are still in force. No Back Orders/No Substitutions still apply. Once the department has completed revising a purchase order, they are to email a copy to Accounts Payable at jpsap@jackson.k12.ms.us in order for A/P to match the revised purchase order to invoice to process payment to vendors. Each department is responsible for maintaining documents of revision for auditing purposes in the event questions or document are requested.
27. It is very important to follow through on items 1 thru 6 above when applicable upon adding requisitions to Marathon. Purchasing will return requisitions unauthorized with a message in the **denied comment box** as to why and what corrections need to be made followed by and email from Bettie Jones or Michele Mays.

28. Always contact the IT Dept. when needing to order any items relating to computer hardware and software to make sure its compatible with in house servers. Hope Thompson is the contact person @ 601.960.8612.
29. **Purchase Order Daily Print Schedule** - Schedule printing of purchase orders was established to prevent any requisitions or Fat Client orders not to be printed. We have discovered that purchase orders were not printing due to the timing that the requisitions or purchase orders were being entered in Marathon. This caused orders not to print which in term caused the schools and various departments to not receive goods and services in a timely manner.

The following tentative print schedule for printing of purchase order are listed below.

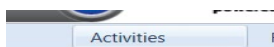
Please contact Procurement and Purchasing Department if you have any questions.

How to add a Requisition to Marathon Remote Link

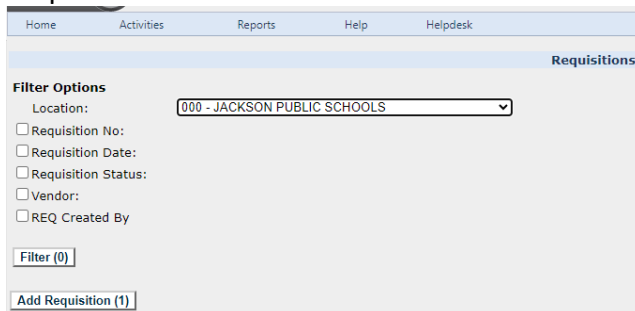
Log onto Marathon Web by Select the Chrome Browser and enter 10.10.4.120, press Enter. Login by entering your user name and password Marathon Web.



1. Log onto Marathon Web
2. Select Memote Link



3. Place cursor on Activities, wait for drop down box, select and click on Purchase Requisition Maintenance.



4. Select and click on Add Requisition

Home Activities Reports Help Helpdesk WebServer	
Add Requisition	
Requisition No: <input type="text" value="0"/>	Location: <input type="text" value="000 - JACKSON PUBLIC SCHOOLS"/>
Requisition Date: <input type="text" value="09/05/2023"/>	Deliver To: <input type="text" value="JACKSON PUBLIC SCHOOLS"/>
Description: <input type="text"/>	<input type="text"/>
Attention: <input type="text"/>	<input type="text"/>
Vendor: <input type="text" value="Type Name/ID here and press Lookup"/> <input type="button" value="Lookup"/>	
<input type="button" value="Back to Filter (6)]"/> <input type="button" value="Save"/> <input type="button" value="Print Screen (Y)"/> <input type="button" value="Add Another (1)"/> <input type="button" value="Print Report"/>	
Note: Federal Fund purchases of goods between \$5,001 and \$50,000 or services between \$10,001 and \$250,000 must have two (2) quotes from qualified sources.	

5. Fill in Description, Attention to Person, Enter first few letters of vendors name and click on lookup. Select vendor, click on save.

Home Activities Reports Help Helpdesk WebServer	
Add Requisition	
Requisition No: <input type="text" value="0"/>	Location: <input type="text" value="000 - JACKSON PUBLIC SCHOOLS"/>
Requisition Date: <input type="text" value="09/05/2023"/>	Deliver To: <input type="text" value="JACKSON PUBLIC SCHOOLS"/>
Description: <input type="text" value="SUPPLIES"/>	<input type="text"/>
Attention: <input type="text" value="BJONES"/>	<input type="text"/>
Vendor: <input type="text" value="JACKSON BUSINESS"/> <input type="button" value="Lookup"/>	
<input type="text" value="2592 - JACKSON BUSINESS SYSTEMS"/>	Vendor Address: walctf547@aol.com 445 WEST AMITE STREET JACKSON, MS 39203
<input type="button" value="Back to Filter (6)]"/> <input type="button" value="Save"/> <input type="button" value="Print Screen (Y)"/> <input type="button" value="Add Another (1)"/> <input type="button" value="Print Report"/>	
Note: Federal Fund purchases of goods between \$5,001 and \$50,000 or services between \$10,001 and \$250,000 must have two (2) quotes from qualified sources.	

6. Click on Add Line Items – Enter Qty, select appropriate unit from drop down box, Description, Catalog #, price and click on Update. Repeat for entering your line items. Once all items are entered, enter special instructions if applicable and person name and contact number in line item.

Home Activities Reports Help Helpdesk WebServer															
Edit Requisition: 993950															
Requisition No: <input type="text" value="993950"/>	Location: <input type="text" value="000 - JACKSON PUBLIC SCHOOLS"/>														
Requisition Date: <input type="text" value="09/05/2023"/>	Deliver To: <input type="text" value="JACKSON PUBLIC SCHOOLS"/>														
Description: <input type="text" value="SUPPLIES"/>	<input type="text"/>														
Attention: <input type="text" value="BJONES"/>	<input type="text"/>														
Vendor: <input type="text" value="JACKSON BUSINESS SYSTEMS"/> <input type="button" value="Lookup"/>	Status: <input type="text" value="In Progress"/>														
<input type="text" value="2592 - JACKSON BUSINESS SYSTEMS"/>	Amount: <input type="text" value="0.00"/>														
<input type="button" value="Back to Filter (6)]"/> <input type="button" value="Next (7)"/> <input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/> <input type="button" value="Print Screen (Y)"/> <input type="button" value="Add Another (1)"/> <input type="button" value="Copy Req"/> <input type="button" value="Add Documents"/> <input type="button" value="Print Report"/>															
Note: Federal Fund purchases of goods between \$5,001 and \$50,000 or services between \$10,001 and \$250,000 must have two (2) quotes from qualified sources.															
Line Items <div style="text-align: right;"><input type="button" value="Add Line Item (L)"/></div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Qty</th> <th>Unit</th> <th>Description</th> <th>Catalog No.</th> <th>Price</th> <th>Amount</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>Box</td> <td>PENCILS</td> <td>1234</td> <td>12.50</td> <td>25.00</td> <td>Update Cancel</td> </tr> </tbody> </table>		Qty	Unit	Description	Catalog No.	Price	Amount	Actions	2	Box	PENCILS	1234	12.50	25.00	Update Cancel
Qty	Unit	Description	Catalog No.	Price	Amount	Actions									
2	Box	PENCILS	1234	12.50	25.00	Update Cancel									
Account Lines <div style="text-align: right;"><input type="button" value="Add Account Line (M)"/></div> <p>No Account Lines Found</p>															

Line Item Inserted.

Line Items

You are viewing page 1 of 1. 1 Total Line Item

Add Line Item (L)

Qty	Unit	Description	Catalog No.	Price	Amount	Actions
2	Box	PENCILS	1234	12.50	25.00	Edit Delete
					Total Amount:	25.00

7. Select and click on Add Account Lines. Select appropriate budget string and enter amount of order. Click on Update.

Account Lines			
>> Account	Amount	Actions	
2110-800-4454-000-000-001	25.00	Add Cancel	
Add Account Lines		Total Amount: 0.00	

Authorization History			
Date	Comment	By	FullName

8. Click on Save, Requisition Updated will appear, click OK and then Submit. Make sure **status box** has an "O" not an "I". The Primary Authorizer will be able to authorize to send to Remote Link Administration for Purchasing to upgrade to a PO if no errors are highlighted in Red.

9. Once submitted to primary authorizer, the window showing the Requisition number will change from a number beginning with a 9 to a number beginning with a 2. The status box will change from the alphabet I (In Progress) to an O (Open)

10. When Budget String is State & Federal or has an object code 731, 734, 735, 737, 738 & 611 or 500 location number, a **Secondary Authorization** will be required before being sent to Purchasing to update to a Purchase Order. Any procurement out of Title/State & Federal funds requires a secondary authorization.

How to Upload and Attach Documents to a Requisition or a Purchase order

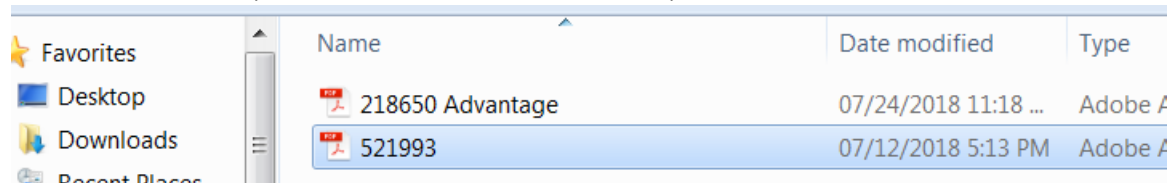
1. Prior to entering a requisition, scan document, name and save in whatever file is chosen to setup.
2. After requisition has been enter but not saved or submitted, click on the window that says Add Documents.

Add Documents

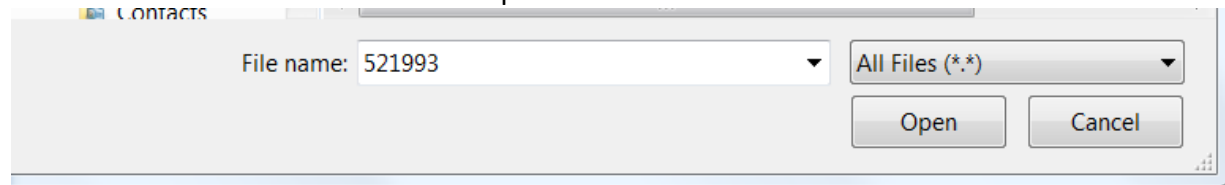
3. Click on drop down arrow to the right of **Category** window and select Documents

Manage Document	
Category:	Bids
Description:	
Select File:	Browse... Upload New File
Note: The max file size for a single file is 10 MB.	

4. Click on Browse, Go to file document is saved in,Click or Select the Saved Document



5. To the bottom of screen click on open.



6. Select and click on **Upload New File**

7. To view document, click on download and the attachment comes up.

e	Description	Category	Date Added	Edit Delete	Download
93.pdf		Documents	07/25/2018	Edit Delete	Download

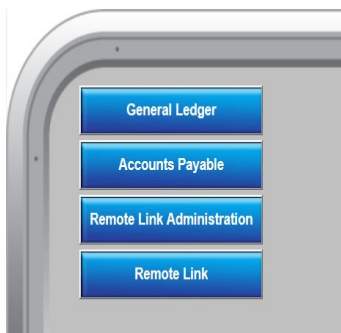
8. You may delete document at any time by clicking on Edit/Delete window.

9. Save Requisition and Submit to Primary for authorization.

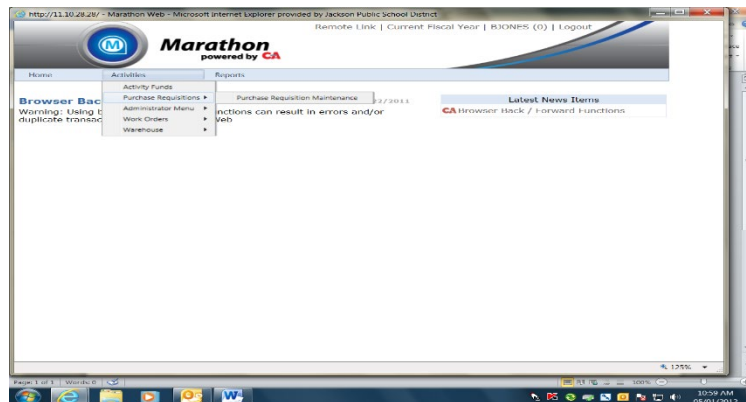
Steps to Revise a Requisition

Log onto Marathon

1. Select and click on Remote Link
2. Place cursor on Activities, wait for drop down box, move cursor to Purchase Requisition Maintenance and click.
3. Change the start date if the requisition is not in the current month. Preferably to 07/01/current beginning school year. Click on Filter
4. Select Requisition to be changed or deleted by clicking on Modify. Click on View if you only need to look at it.
1. Always check the **Denied Comment Box** for messages. Marathon will inform you how many denied requisitions you have. Unauthorized requisitions are highlighted in orange.
2. Make modification and save twice and submit.
3. Requisition must be resubmitted back to the primary/secondary for **re-authorization** so it can be updated to a purchase order.
4. If Deleting the Requisition click on Delete and then OK.



1.



2.

Home Activities Reports

Requisitions

Filter Options

Location: 504 - PURCHASING

Requisition No: 0

Requisition Start Date: 05/01/2012

Requisition End Date: 05/31/2012

Requisition Status: All

Vendor:

3.

Requisitions

Filter Options

Location: 504 - PURCHASING

Requisition No: 0

Requisition Start Date: 07/01/2011

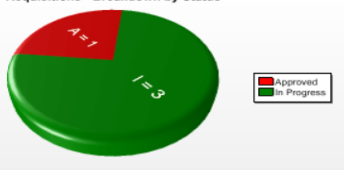
Requisition End Date: 05/31/2012

Requisition Status: All

Vendor:

[Hide Filter...](#)

Requisitions - Breakdown by Status



Legend: ■ Approved ■ In Progress

Drag a column to this area to group by it.

Req. No.	Req. Date	Description	Vendor	Status	Denied	Amount	PO No	Attn.	Modified On	Modified By	Actions
175295	Jan 09 2012	SUPPLIES	BAREFIELD & CO	A		\$25.79	443165	ANA CROSSLEY	Jan 09 2012, 05:29:52 PM	BJONES	View
901755	Aug 31 2011	SUPPLIES	CLARION LEDGER - SUBSCRIPTIONS	I		\$0.00			Aug 31 2011, 12:32:18 PM	BJONES	View Modify
905141	Nov 14 2011	SUPPLIES	JPS/TEACHER RESOURCE CENTER	I		\$0.00			Nov 14 2011, 10:21:40 AM	BJONES	View Modify

Home Activities Reports

Edit Requisitions

Requisition No: 901755 Requisition Date: 08/31/2011

Description: SUPPLIES

Attention:

Vendor: CLARION LEDGER - SUBSCRIPTIONS

Location: 504 - PURCHASING

Deliver To: PURCHASING

Status: I In Progress

Amount: 0.00

☐ Include Accounts with No Available Balance

Denied Comment:

Warning: Using browser back/forward functions can result in errors and/or duplicate transactions

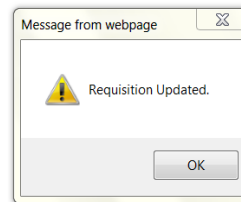
Line Item Information

Qty	Unit	Description	Catalog No.	Price	Amount	Actions
<input type="button" value="Add Line Item"/> Total Amount: 0.00						

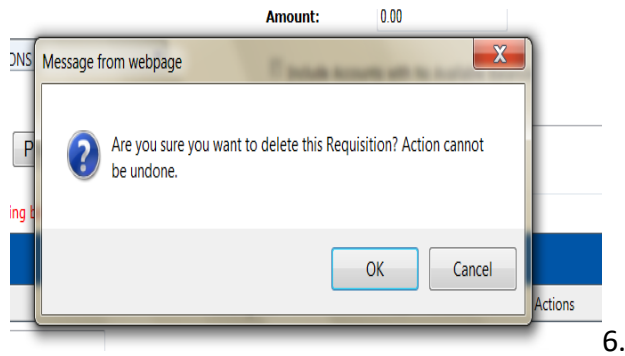
Account Lines

Account	Amount	Actions
<input type="button" value="Add Account Lines"/> Total Amount: 0.00		

Hide



5.



NOTE

FYI: Corrections made to a requisition due to being unauthorized and sent back to originating department, it must be saved and submitted back to the primary/secondary for reauthorization after changes or modification have been made.

A Follow up Email on Denied Requisitions will be sent to the Remote Link User that entered the request.

Steps to Pull Master Listing or Print Requisition

1. Log in to Marathon
2. Select Remote Link
3. Place cursor on Report wait for drop down box & Stroll to Purchase Requisition
4. Move cursor to the right selecting Requisition Master Listing or Print Purchase Requisition.
5. Enter requisition number or click on filter.
6. If requisition was not entered in the current month, back the date up to the first of the month the Requisition was entered in Remote Link.

Amazon Business

Amazon can only be used for District Funds, Activity Funds, Grants and Donations (if applicable).

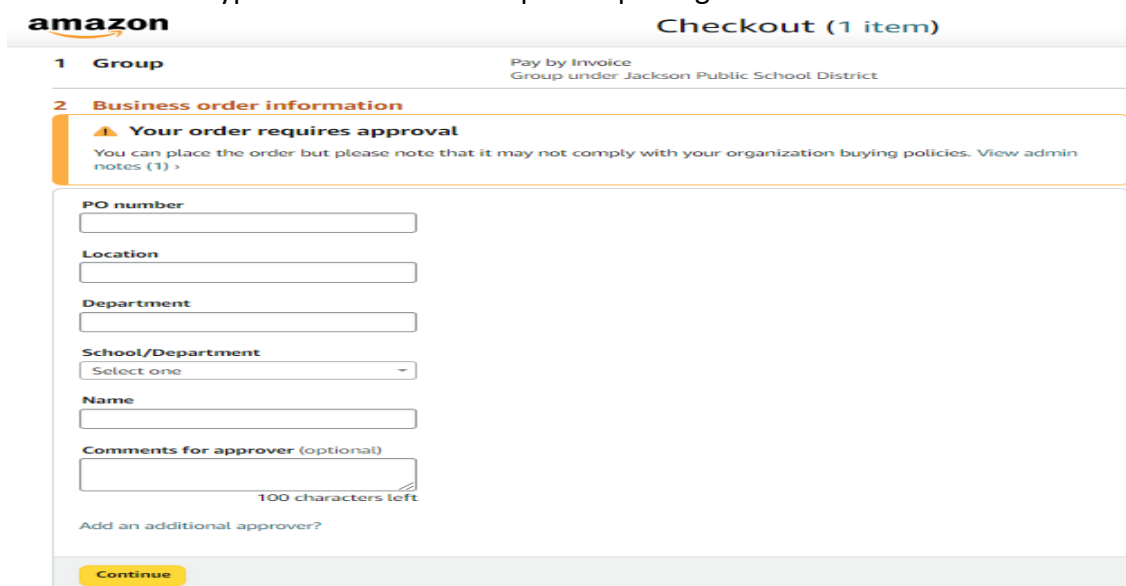
Federal Funds are not authorized for use with Amazon.

Amazon Business Prime: If interested in ordering from Amazon Business, send the Amazon Business Interest form to the Procurement and Purchasing Department. Amazon order takes two (2) parts to complete.

- Amazon Business, after finding the items that you are ordering, continue to checkout (see below step-by-step procedure)
- Amazon orders after submitted for approval will only be available for seven (7) days before the order expires.
- Marathon request MUST also be submitted for Amazon Order is approved.
- Contact anyone that must authorize your order, to help with your order not expiring.
- You MUST complete a Marathon Requisition following the same procedures for JPS and submitting it for approval. (nothing changes)
- Prices must be the same on both the Marathon Requisition and Amazon Business order. Orders with different prices, will not be approved and will be subject to expiration, rejection, or will be unauthorized.

1. Checkout screen #2

- PO Number – List your requisition number from Marathon.
- Location – Type in the Location of who is placing the order.
- School/Department – Find the School/Department of the person placing the order.
- Name – Type in the name of the person placing the order.



amazon **Checkout (1 item)**

1 Group Pay by Invoice
Group under Jackson Public School District

2 Business order information

⚠ Your order requires approval
You can place the order but please note that it may not comply with your organization buying policies. View admin notes (1) >

PO number

Location

Department

School/Department
Select one

Name

Comments for approver (optional)

100 characters left

Add an additional approver?

Continue

2. Checkout Screen #3

- Type the Delivery to information: The person the item is being delivered to.

- b. Type in the address of the location, all addresses will populate.
 - i. You will not be able to enter an address. If it does not populate, contact Purchasing for any changes of JPS addresses or additional JPS addresses needed.
- c. Click on “use this address.”

3 Choose a shipping address

i Keep operating hours up to date

If your hours ever change at an address, click **Edit delivery preferences** to update them.

Does this order need to be delivered to a recipient other than the name in your address book?

Deliver To: This will be applied to only this order.

Search addresses:

Group Pay by Invoice addresses

- ☒ **Casey** CASEY 2101 LAKE CIR, JACKSON, MS, 39211-6616, United States, Phone: 601-987-3510 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Academies of Jackson** Academies of Jackson, 1985 Scanton Drive, Jackson, MS, 39204, United States, Phone: 6013714350 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Active Parent** Active Parent, 1017 Robinsons Street, Jackson, MS, 39203, United States, Phone: 6019608850 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Advance Academics** Advance Academics, 662 South President Street President Street, Jackson, MS, 39201, United States, Phone: 6019608791 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Assets and Property** Assets and Property, 638 South President Street, Jackson, MS, 39201, United States, Phone: 6019738561 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Athletics** Athletics, 101 Near Street, Jackson, MS, 39203, United States, Phone: 6019608825 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Attendance and Discipline** Attendance and Discipline, 1017 Robinson Street, Jackson, MS, 39203, United States, Phone: 6019608850 [Edit address](#) | [Edit delivery preferences](#)
- ☐ **Baker** Baker, 300 East Santa Clair Street, Jackson, MS, 39212-3044, United States, Phone: 601-371-4327 [Edit address](#) | [Edit delivery preferences](#)

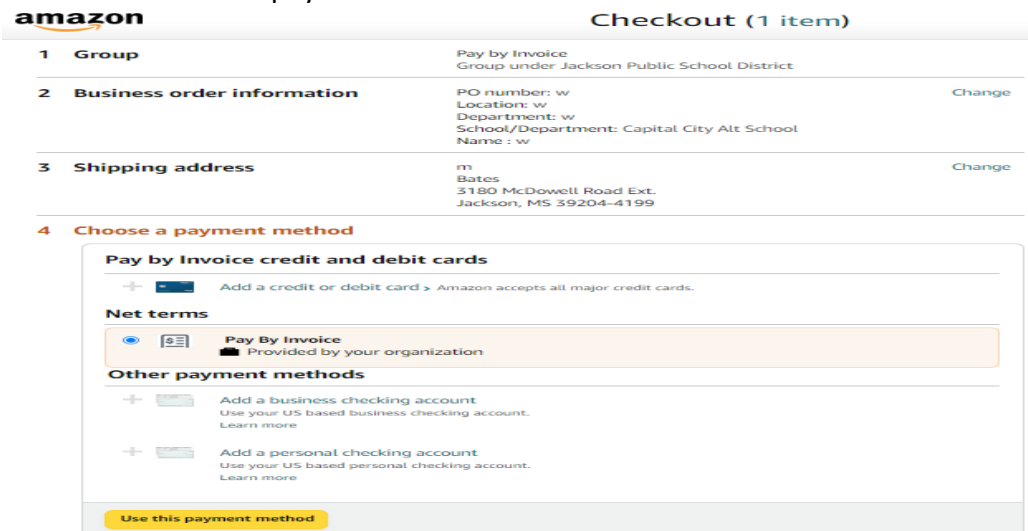
< Previous
Next >

+ Add a new address

Use this address

3. Checkout Screen #4

- Choose your payment method.
- Pay by Invoice
- Click on “use this payment method.”



amazon **Checkout (1 item)**

1 Group	Pay by Invoice Group under Jackson Public School District	
2 Business order information	PO number: w Location: w Department: w School/Department: Capital City Alt School Name : w	Change
3 Shipping address	m Bates 3180 McDowell Road Ext. Jackson, MS 39204-4199	Change
4 Choose a payment method		

Pay by Invoice credit and debit cards

+ Add a credit or debit card > Amazon accepts all major credit cards.

Net terms

☒ **Pay By Invoice**
Provided by your organization

Other payment methods

+ Add a business checking account
Use your US based business checking account.
[Learn more](#)

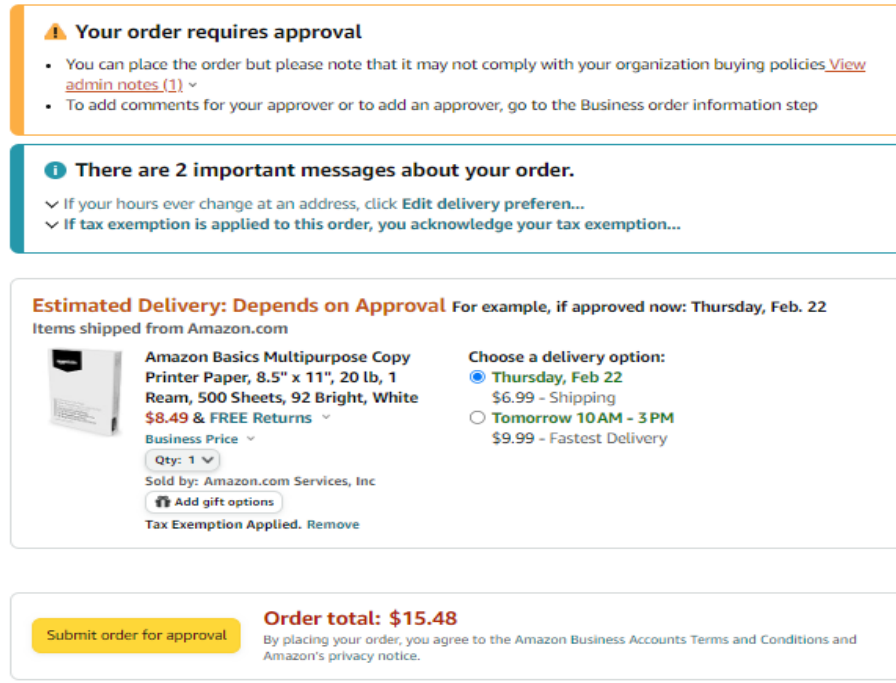
+ Add a personal checking account
Use your US based personal checking account.
[Learn more](#)

Use this payment method

4. Checkout Screen #5

- Review your information.
- Submit order for approval.
- Order will then come to Purchasing to approve.

5 Review items and shipping




⚠ Your order requires approval

- You can place the order but please note that it may not comply with your organization buying policies [View admin notes \(1\)](#) v
- To add comments for your approver or to add an approver, go to the Business order information step

ℹ There are 2 important messages about your order.

- ✓ If your hours ever change at an address, click [Edit delivery preferen...](#)
- ✓ If tax exemption is applied to this order, you acknowledge your tax exemption...

Estimated Delivery: Depends on Approval For example, if approved now: Thursday, Feb. 22
Items shipped from Amazon.com



Amazon Basics Multipurpose Copy Printer Paper, 8.5" x 11", 20 lb, 1 Ream, 500 Sheets, 92 Bright, White
\$8.49 & FREE Returns v
 Business Price v
 Qty: 1 v
 Sold by: Amazon.com Services, Inc
[Add gift options](#)
 Tax Exemption Applied. [Remove](#)

Choose a delivery option:

☒ **Thursday, Feb 22**
\$6.99 - Shipping

☐ **Tomorrow 10AM - 3 PM**
\$9.99 - Fastest Delivery

Submit order for approval **Order total: \$15.48**
 By placing your order, you agree to the Amazon Business Accounts Terms and Conditions and Amazon's privacy notice.

Purchasing Guidelines for Teachers



What is the amount I can order without requesting quotes?

Materials must be no more than \$5,000.00 before shipping charges. If over \$5000 must provide two identical quotes from two different vendors to have an IB (Informal Bid#) to make purchases.



Why do we have these purchasing guidelines?

The State of Mississippi has enacted these purchasing laws and the JPS Board of Trustees has approved them.



How do I add a vendor to Marathon?

Fax or email the Add Vendor Form & W-9 to the company. Your school/department location name should be entered on the form as the requesting location. The vendor completes these forms and faxes back to the Purchasing Department. We add the vendor in the data base for you.



What information should be entered on my purchase requisition?

- Vendor information
- Complete item numbers
- Brief description to identify items requested
- Shipping charges if applicable
- Contact person name and phone number in case vendors have issues with a purchase order
- If any special instructions are applicable



Why do I have to order from a Jackson vendor?

Jackson Public Schools is committed to supporting businesses within the City of Jackson. We believe that our businesses are vital to the success of our students and our schools. We also believe that the district should strive where possible to acquire goods and professional services from qualified businesses within the City of Jackson. The district is **not** willing, however, to sacrifice quality, noncompetitive or inflated pricing in its pursuit

to support Jackson businesses. In light of our desire to support Jackson businesses, we are pledging to put JACKSON businesses FIRST when acquiring goods and professional services.



How long does it take for a purchase order to be issued?

Your Office Manager enters a requisition in Marathon. The requisition is authorized by your principal. Some requisitions require secondary authorization. Secondary authorization would be for items such as computers, printers and software. After authorization, the requisition is submitted electronically to the Purchasing Department. The Purchasing Department strives to issue all purchase orders within 3 days of receipt. Your Office Manager can pull a report (Master Listing in Marathon) that will indicate if a correction is needed, authorization status, and the date a purchase order is issued.



Can I call the vendor with my order?

No. A purchase order must be issued before materials can be ordered. The Purchasing Department will send purchase order for the materials to vendor by faxing, email or postal service.



What if the vendor did not receive my purchase order?

Always follow up with vendor after two weeks of a po is issued. If the vendor does not have your order two weeks after the purchase order date, your Office Manager should email Michelle Robinson or Bettie Jones to request that a second request purchase order copy be faxed or emailed to the vendor. Be sure to include the fax number or email address so purchasing can expedite second request.



How do I cancel a purchase order if the vendor advises that the items are not available?

Your Office Manager should email Michelle Robinson with a request to close your purchase order. Immediately contact the vendor to inform them you are cancelling the order. Funds are immediately available after your purchase order has been closed.

Quick Vendor Information

Office Depot Log In Information

Office Depot JPSD Discount Website: <https://www.odpbusiness.com>

- User ID Log In: JPS Staff
- Password: Welcome1
- Effective July 01, 2021, Small orders under \$50.00 will be charged a \$9.99 shipping fee.

If you attempt to login incorrectly three times, it locks the entire District out. If locked out send an email to

Mr. Cornelius Mozee, Office Depot's District area representative cornelius.mozeet@officedepot.com
601-981-8090

Office Depot requisitions are checked and verified for correct pricing by Purchasing. Any applicable requisitioned orders without discount pricing will be unauthorized and send back to the Marathon Remote Link user that entered it. Log in is case sensitive and must be entered exactly as displayed above.

Barefield and Company

Barefield and Company Website: www.barefieldandcompany.com

- Click on the **OFFICE SUPPLIES** tab at the top.
- This will direct you to **PLEASE LOGIN** (top right corner)
- **USER ID Log In:** jacksonk12
- Password: supplies

You may click on any of the tabs to access the products you need and in the top right corner is MY ACCOUNTS, this will take you to LAUNDRY LISTS and select STATE CONTRACT (this will provide the best pricing, if the item you need is on state contract).

Mississippi Industries for the Blind

Mississippi Industries for the Blind Website: <http://shop.msblind.org>

- Username: jacksonpublicschools
- Password: JPSschool

**REQUEST TO ADD VENDOR**

Post Office Box 2338 - Jackson, Mississippi 39225-2338

Email form to mmays@jackson.k12.ms.us or todom@jackson.k12.ms.us | Fax to (601-960-8967)

School/Department Requesting Vendor Addition _____

To be completed by Vendor: Please complete all sections:Will your company accept purchase orders? ☐ Yes ☐ No**Note:** As an approved Vendor, you agree not to accept any order from JPS without an approved purchase. **Orders taken and completed without a Purchase Order will be considered a Donation to JPS.**Are you an employee of the Jackson Public School District? ☐ Yes ☐ No**PRODUCT LINE:** _____

Parent Company Name: _____

Doing Business As (DBA) Name: _____

Parent Company Tax #: _____ D/B/A Federal Tax ID/Social Security #: _____

Physical Address: _____ City _____ State _____ Zip-code _____

Remittance Address: **(If Different):**

Address: _____ City _____ State _____ Zip-code _____

Contact Person: _____ Phone: (____) _____

Fax: (____) _____ **Email Address for POs:** _____**Select One: This information will be used to track purchases from minority vendors.**

Minority Code: ☐ Woman & Minority ☐ Minority ☐ Non-Minority ☐ Woman
 Type of Entity: ☐ Individual/Sole Proprietor ☐ Corporation ☐ Partnership ☐ Other

Submitted By: Signature _____ Date _____

ADDITIONAL INFORMATION REQUIRED: The following forms must be submitted

- ☐ IRS W-9 Form [Request for Taxpayer Identification Number and Certification](#)
☐ Certificate of Liability Insurance for not less than \$1,000,000 as stated in Mississippi Code Section 31-7-179v

FOR INTERNAL USE ONLY

Vendor Number: _____ 1099: ☐ Yes ☐ No
 Completed By: _____ Date: _____

Company's W-9 must accompany this form for IRS purposes and Certificate of Insurance.

The vendor must provide proof of insurance (**Certificate of Insurance**) for not less than \$1,000,000.00 as stated in Mississippi Code Section 31-7-139v)

Note: An original JPSD purchase order is required for all procurement. Do not accept any order without a purchase order. ****JPS accepts no responsibility for orders filled without a valid issued purchase order number***.

<p>Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service</p>	<p>Request for Taxpayer Identification Number and Certification</p> <p>Go to www.irs.gov/FormW9 for instructions and the latest information.</p>	<p>Give form to the requester. Do not send to the IRS.</p>																						
<p>Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i>, below.</p>																								
<p>Print or type. See Specific Instructions on page 3.</p>	<p>1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)</p>																							
	<p>2 Business name/disregarded entity name, if different from above.</p>																							
	<p>3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p> <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) </p>																							
	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any)</p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)</p> <p>(Applies to accounts maintained outside the United States.)</p>																							
	<p>3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/></p>																							
	<p>5 Address (number, street, and apt. or suite no.). See instructions.</p>																							
	<p>6 City, state, and ZIP code</p>																							
<p>7 List account number(s) here (optional)</p>																								
<p>Part I Taxpayer Identification Number (TIN)</p> <p>Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i>, later.</p> <p>Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</p>																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center;">Social security number</td> </tr> <tr> <td style="width: 40%; text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="width: 20%; text-align: center;">-</td> <td style="width: 20%; text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="width: 20%; text-align: center;">-</td> <td style="width: 20%; text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> </tr> <tr> <td colspan="5" style="text-align: center;">or</td> </tr> <tr> <td colspan="5" style="text-align: center;">Employer identification number</td> </tr> <tr> <td style="text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="text-align: center;">-</td> <td style="text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> <td style="text-align: center;">-</td> <td style="text-align: center;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> </tr> </table>			Social security number		<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	-	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	-	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	or					Employer identification number					<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	-	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	-	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
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<p>Part II Certification</p> <p>Under penalties of perjury, I certify that:</p> <ol style="list-style-type: none"> The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and I am a U.S. citizen or other U.S. person (defined below); and The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. <p>Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.</p>																								
<p>Sign Here</p>	<p>Signature of U.S. person</p>																							
	<p>Date</p>																							

Steps to Submit a Vendor for Approval

1. Requesting schools or departments must list the school/department name on the first line of Request to Add Vendor Form before sending the form to the vendor. School/Departments are responsible for sending the forms to the vendor they want to acquire goods and services from and inform vendor a W-9 is needed to add them to the JPSD data base.
2. Vendor must complete the vendor form and submit their W-9 in its entirety. Do not leave any information blank.
3. Vendor must check appropriate box for federal tax classification in Section (3) of W-9.
 - TIN or EIN Number must match the name given on line 1 of W-9 to avoid backup withholding.
 - In the event vendor does not know the correct TIN or EIN to list on W-9:
 - The IRS Department of the Treasury issued Employer Identification Number (EIN) is listed on the CP 575 Notice letter sent to your business when approved for EIN/TIN #.
 - Business name (line1) and EIN # issued by the IRS (Part 1) on W-9 must match in IRS information.
 - If no EIN # is issued by the IRS, the Social Security Number in (Part 1) must match name online (1) of W-9 or the name taxes are being filed under.
5. Both Vendor Form and W-9 must have a hand-written or electronic signatures and dated.
 - W-9 must be current within one (1) year.
5. Completed forms may be faxed to number listed, emailed, or mailed to the address listed.
6. Vendors individual names are verified through JPSD payroll system to ensure they are not employees of the District.
7. After vendor has been added to the vendor data base, a welcome email, Instruction/Terms and Conditions and information on how to update their vendor profile is sent to the vendor via email.
8. Please contact our office if you have any questions.

NOTE: Jackson Public School District Employees cannot be vendors for the District. It is against policy under Conflict of Interest.

Business Office/Purchasing does not solicit vendors information to be added or updated to the JPSP data base; information is provided to the Purchasing Department. It is considered a conflict of interest for Purchasing to solicit, add or update vendors file with vendors consent or documentation in writing.

Steps to Update Vendor Profile

Vendor Information in our data base may require updating from time to time.

In the event a vendor may need to send an update of address or other information; they can do by emailing Procurement and Purchasing Department or faxing to 601-960-8967 or may hand deliver information on their company letterhead a change of order address or remit to address.

If name and tax ID# has changed, the vendor will need to request and complete a new Request to Add Vendor Form and submit a copy of their W-9 to the Business Office/Purchasing to mmays@jackson.k12.ms.us or todom@jackson.k12.ms.us fax to 601-960-8967.

- Both the Add Vendor Form and W-9 must have a hand-written or electric signature and the date
 - W-9 must be current within one (1) year.
- 2. Completed forms may be faxed to the number listed, emailed or mailed to the address listed.
- 3. Vendors' individual names are verified through the JPS payroll system to ensure they are not employees of the District.
 - After the vendor has been added to the vendor database, a welcome letter and instructions/Terms and Conditions will be sent to the vendor via email.
 - Please contact our office if you have any questions.
- 4. **NOTE:** Jackson Public School District employees cannot be vendors for the District. It is against the Employee Conflict of Interest Policy (GACD).

Exhibit 3



Jackson Public School District

Purchasing Department

Post Office Box 2338 - Jackson, Mississippi 39225-2338

Fax: 601-960-8967 or Email:

JPS Standard Informal Bid Form (IB)

Date: _____

Requesting Department _____

Address/Location _____

Contact Person _____

Phone/ _____ Fax _____

Proposal
Description/Specifications:
Exclusion:
Terms if Applicable:
Material Cost _____ Installation Cost _____ Total Cost _____
Vendor /Company Name _____ Address _____ City/St./Zip Code _____ Signature _____ Date _____

Responses may be faxed to 601-960-8967 to the attention of Purchasing or email to mmays@jackson.k12.ms.us or todom@jackson.k12.ms.us

Note: Faxed, mailed or hand delivery must have a handwritten signature/ date on proposal.

Informal Bid Instructions

1. The soliciting entity completes top portion of form including the date.
 - Brief Description is completed by the school or department.
 - Name or description of items being solicited goods or services.
 - Specifications if applicable
 - Quantity/ number of items
2. Select Two (2) or more vendors to solicit quotes from.
3. The vendor completes their portion including pricing, vendor information, signature, and date.
4. Submit completed quotes by faxed, emailed or hand delivered to Purchasing in the Business Office on company letterhead; preferably on the JPSD IB Proposal Form.
5. Faxed, mailed or hand delivered quotes must have vendor's handwritten or electronic signature and date.
6. When emailed, the original email from the vendor must be accompanied with the quote if no signature. Original email will serve as the signature.
7. Quotes will be compared apples to apples according to state policy and procedures. Items quoted must be identical.
8. The Procurement and Purchasing Department will issue an approved IB number, and that information will be email to the requestor.
9. The IB# and date must listed in the line item of the requisition.
10. Questions: Contact the Procurement and Purchasing Department at 601-960-8799 or 601-973-8582
11. Certificate of Insurance (if applicable) must be submitted with IB proposal forms.
 - General Liability of not less than \$1,000,000.00
 - Workers Compensation of not less than \$1,000,000.00
12. For any construction or installation of goods and services, the vendor's Certificate of Insurance Must accompany the vendor's IB proposal prior to being sent to Purchasing to process.

Declaration of a Single Source Request

This form shall be submitted to the Purchasing Department for the request of Single Source Items. Presentation to the Board of Trustees for approval of the purchase of Single Source Items cannot be made until this form is accurately completed. Purchases of requested item(s) shall not be made until approval has been given by the Board of Trustees.

Location: _____ Date: _____

Budget String: _____ Amount: _____

Vendor Name:

Address:

Phone Number: _____ Fax Number: _____

Email Address: _____

Vendor Contact Person:

Please describe how this item or material will be used in the District?

Is it compatible with existing equipment if applicable? _____

Do other companies make similar products that are acceptable? If not, what can this product do that other products cannot?

Is there a copyright or patent on this product? _____

Is the manufacturer the only distributor or does the manufacturer only sells to specific distributors instead of direct sales? _____

What research have you done to confirm that the items requested are of a single source, non-competitive, non-comparative nature, as defined by Mississippi Code of 1972 Annotated (31-7-13)? Please attach documentation verifying that the item or material is Single Source.

Give amount of purchase price and an explanation as to why the amount to be expended for the commodity is reasonable.

Sole Source Letter Attached: _____ Yes _____ No

Please attach a history or narrative of the department's use of the commodity/service. The narrative must indicate whether the item/service was first procured as a non-competitive single source.

The signatures below indicate that this purchase blanket a commodity that is available from one source only and neither comparative nor competitive quotations can be obtained.

Signature of Requesting Party: _____ Date: _____

Signature of Assistant Superintendent: _____ Date: _____

Signature of Chief Operations Officer _____ Date: _____

Signature of General Counsel: _____ Date: _____

Signature of Superintendent of Schools: _____ Date: _____

Board Approval Date: _____

Single/Sole Source Check list

1. *Determine item or items need*
2. *The purpose*
3. *The compatibility to what already exists.*
4. *Is cost reasonable for the district*
5. *Superintendent authorization*
6. *Complete the Declaration of a Single/Sole Source Request Form*
7. *Obtain all signatures required.*
8. *Request must be received four (4) weeks prior to board meeting*
9. *Submit copies of documentation to the Purchasing Office after Board has approved the single source.*
10. *Board approved single source purchase is good for all that school year*

11. See the purchasing guide for more instructions

12. When in doubt, contact the purchasing office

Questions and Answers

1. **What is the amount I can order without requesting quotes?**

Materials up to **\$5,000.00** excluding shipping charges. District policy and guidelines still apply to federal funds. All Federal funds are required to have two quotes and the Sam.gov vendor EPL (Excluded Party List) uploaded to requisitions.

2. **What if my order is over \$5,000.00?** Call the Procurement and Purchasing Department for assistance.

3. **Can I place several orders under \$5,000.00 so I do not have to get quotes?** No. By attempting to split purchase orders knowingly and willingly to circumvent obtaining quotes or a bid is illegal.

4. **Why do we have these purchasing guidelines?** The State of Mississippi has enacted these laws and the JPSD Board of Trustees has approved them.

5. **What information should be entered on my purchase requisition?** **Also noted on page 18.**

- Attention Line: Person who the materials will be shipped to
- Complete quantity, description, item number, unit price, Marathon will calculate extended when added.
- Any special instructions, Shipping charges or Free Shipping
- A contact person name and (phone number.) XXX-XXX-XXXX entering the requisition so if vendor have any questions.
- **All CAPITAL LETTERS are used** in Marathon when entering requisitions.
- **Non-student & Non- Federal Funded food purchases:** List the agenda (where event is held, what for, date, how many participants and food items goes in the line item on the Marathon requisition. The sign in sheets from the events must be attached to the POD sent to Accounts Payable. See page 5 & 6 for procedures on Federal Funded food purchases.

6. **How do I add a vendor to Marathon?**

- A request To Add Vendor Form & W-9 are faxed or emailed to the vendor by the requesting location or requesting entity. Please add your location at the top of the form. The **vendor completes the form, attaches their completed W-9. And a copy of their Certificate of Insurance that includes workers compensation if the vendor has a staff of more than five**

(5) employees and faxes or emails all signed forms back to the Purchasing Department upon completion. **See pages 32 & 33.**

- This form can be found on the JPS Intranet Page. It is located under the Forms & Docs Index. Click on Forms and then the Add Vendor Request Form.
- Contact the Purchasing Dept. at (601-973-8582) or Procurement specialist at 601-960-8799 in the if you have questions.

Instructions to Update Vendor Information

Vendor Information in our data base may require updating from time to time.

In the event a vendor may need to send an update of address or other information; they can contact Purchasing at 601-960-8799 or 601-973-8582 or fax to 601-960-8967 or may hand deliver information on their company letterhead a change of order address or remit to address.

If name and tax ID# has changed, the vendor will need to request and complete a new Request to Add Vendor Form and submit a copy of their W-9 to the Business Office/Purchasing by faxing to 601-960-8967.

7. **Can I modify the items or allow the vendor to on a purchase order?** **No**, substitutions, backorders or duplicate orders, or items not listed on the purchase orders are not allowed. This would be a direct violation of policy and procedures. If you receive any items of this nature, contact the vendor immediately to arrange for pick-up of those items. Always check delivered shipments immediately for accuracy or discrepancies.
8. **Can items on a purchase order be picked up that's not on the original purchase order?** **No**, again this is a violation of policy and procedures.
9. **Who revises purchase orders?** The Purchasing Department revises all purchase order requests. Send an email listing the po# and the revision that need to be made to the order. An email will be sent confirming the revision along with an attached copy of po to use for the pod. If the vendor needs a copy of the revised po, list in your email the vendors fax # or email address and Purchasing will forward a copy to them.
10. **How do I cancel a purchase order if the vendor advises that the items are not available, or it is decided you no longer need the items and they have not been received?** Email the purchase order number to Michele Mays at mmays@jackson.k12.ms.us or Tequia Odom at todom@jackson.k12.ms.us to request a purchase order to be close. Funds are immediately available after purchase order has been closed. Confirmation email will be sent. Please advise the vendor you are cancelling the order to avoid shipment.

11. **What if the vendor did not receive my purchase Order?** If the vendor does not have your order two weeks after the purchase order issued date, email Michelle Robinson or Bettie Jones to request a second copy be faxed or emailed to the vendor. List the fax # or vendor's email address in your email. Contact the vendor to get that information if need be.
12. **Do I enter my conference registration in Marathon?** **No**, only student travel out of object 580 if an outside vendor is used.
13. **Why do I need to check the Requisition Master Listing Report?** This report will give you the status of your order. If a correction is needed? Has it been authorized? Has a purchase order been issued?
14. **Why was my requisition returned for correction when I used object 730 for furniture?** Object 730 is only used for furniture & equipment when the unit price is \$500.00 or more. Object 610 is used for furniture under \$500.00. Do not look at the requisition total but the unit prices.
15. **What information goes on the four description lines of my requisition?** Information entered on these lines does not print on the purchase order. The first should contain general description of requisitioned items (computers, office supplies, classroom materials etc.). Lines two thru four are for internal messages. Those lines do not print on purchase order, only viewed in Marathon and by the Board of Trustees.
16. **Who are authorized to delete Requisitions?** Requisitions that have not been upgraded to a purchase order can **only** be deleted by the Marathon Remote Link user that entered the requisition.
17. **What are the procedures for picking up an order from Lowes or any vendor?** Enter requisition for items as usual. Place **WILL PICK UP ORDER** in the line item. When requisition is up graded to a purchase order, acquire a copy of the purchase order to carry to the store. Contact Lowes Pro Desk at **601-923-4448** to see if order is ready for pickup. Carry the purchase order to the Pro Desk and ask for **Mr. Ted Taylor**. Only pick up the items listed on the po. Each purchase order is paid and billed separately. **Do Not Combine purchase orders?** Submit the POD, store sales receipt to Accounts Payable for processing.
18. **How does the District Purchase School Yearbooks?**
Statue 37-1-7 (xxx) State of Mississippi Procurement Manual allows governing authorities to purchase School Year Books using an **RFP** process to solicit quotes. This statue is set forth by the Mississippi Procurement Manual adopted by DFA/Office of Purchase and Travel.
Please contact the JPSD Business Office/Purchasing Department for assistance.
Contacts are:

Contact Purchasing at 601-973-8582 or 601-960-8799

An RFP Example may be requested for guidance from the Purchasing Department.

- Check out the Intranet Purchasing Page for additional information.
- Do not order remanufactured print cartridges.

For 2024-2024 FY school year, the cutoff for entering requisitions using District Funds is April 04, 2024.
Only Facilities & Operations/Warehouses will be able to place orders.

PURCHASING RECAP

- Order from local vendors to support the Jackson First policy whenever possible.
- Type requisitions in all **CAPS**.
- Four Description Lines: Nothing entered here prints on the purchase order.
- Line 1: Brief description of items – Supplies, Computers, Classroom Materials, Library Books, etc.
- Lines 2-4 – Internal information only. Example: Company does not have item numbers. Attention Line: Person at your school who the materials are for.
- Provide item number and brief description of each item. Shipping or no shipping charges or add 10% of items order and enter that amount as shipping cost.
- ???? Call (Name) at 601-Phone Number. This should be the person who enters requisitions in case the vendor has questions about your order.
- If your order is more than \$5,000.00, excluding shipping, please call the Purchasing Department for help.

The following items should only be ordered from Central Warehouse:

- Hand Sanitizer
 - Flash Drives
 - First Aid Supplies
 - Cleaning Products
 - Copy Paper
 - PPE Supplies
- Contact the IT Department (Hope Thompson at htompson@jackson.k12.ms.us) before purchasing any technology equipment such as computers, hardware, software or any items relevant to technology to obtain quotes. **When such items are not on the EPL, IT or State Contract or a bid, rfp, rfq or reverse auction, ordering entity will solicit two quotes for an Informa Bid to be issued and the lowest price quote from vendors will be used.**

Electronic Code of Federal Regulations

e-CFR data is current as of November 2, 2018

[Title 2](#) → [Subtitle A](#) → [Chapter II](#) → [Part 200](#) → [Subpart D](#) → Subject Group

Title 2: Grants and Agreements

[PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS](#)

[Subpart D—Post Federal Award Requirements](#)

PROCUREMENT STANDARDS

§200.317 Procurements by States.

When procuring property and services under a Federal award, a state must follow the same policies and procedures it uses for procurements from its non-Federal funds. The state will comply with §200.322 Procurement of recovered *materials* and ensure that every purchase order or other contract includes any clauses required by section §200.326 Contract provisions. All other non-Federal entities, including subrecipients of a state, will follow §§200.318 General procurement standards through 200.326 Contract provisions.

§200.318 General Procurement Standards.

(a) The Non-Federal entity must use its own documented procurement procedures which reflect applicable State, local, and tribal laws and regulations, provided that the procurements conform to applicable Federal law and the standards identified in this part.

(b) Non-Federal entities must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

(c)(1) The Non-Federal entity must maintain written standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. However, non-Federal entities may set standards for situations in which the financial interest is not substantial, or the gift is an unsolicited item of nominal value. The standards of conduct must provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the non-Federal entity.

(2) If the non-Federal entity has a parent, affiliate, or subsidiary organization that is not a state, local government, or Indian tribe, the non-Federal entity must also maintain written standards of conduct covering organizational conflicts of interest. Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, the non-Federal entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization.

(d) The Non-Federal entity's procedures must avoid acquisition of unnecessary or duplicative items. Consideration should be given to consolidating or breaking out procurements to obtain a more economical purchase. Where appropriate, an analysis will be made of lease versus purchase alternatives, and any other appropriate analysis to determine the most economical approach.

(e) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal Government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.

(f) The Non-Federal entity is encouraged to use Federal excess and surplus property in lieu of purchasing new equipment and property whenever such use is feasible and reduces project costs.

(g) The Non-Federal entity is encouraged to use value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions. Value engineering is a systematic and creative analysis of each contract item or task to ensure that its essential function is provided at the overall lower cost.

(h) The Non-Federal entity must award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions of a proposed procurement. Consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources. See also §200.213 Suspension and debarment.

(i) The Non-Federal entity must maintain records sufficient to detail the history of procurement. These records will include, but are not necessarily limited to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price.

(j)(1) The Non-Federal entity may use a time and materials type contract only after a determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. Time and materials type contract means, a contract whose cost to a non-Federal entity is the sum of:

(i) The actual cost of materials; and

(ii) Direct labor hours charged at fixed hourly rates that reflect wages, general and administrative expenses, and profit.

(2) Since this formula generates an open-ended contract price, a time-and-materials contract provides no positive profit incentive to the contractor for cost control or labor efficiency. Therefore, each contract must set a ceiling price that the contractor exceeds at its own risk. Further, the non-

Federal entity awarding such a contract must assert a high degree of oversight in order to obtain reasonable assurance that the contractor is using efficient methods and effective cost controls.

(k) The Non-Federal entity alone must be responsible, in accordance with good administrative practice and sound business judgment, for the settlement of all contractual and administrative issues arising out of procurements. These issues include, but are not limited to, source evaluation, protests, disputes, and claims. These standards do not relieve the non-Federal entity of any contractual responsibilities under its contracts. The Federal awarding agency will not substitute its judgment for that of the non-Federal entity unless the matter is primarily a Federal concern. Violations of law will be referred to the local, state, or Federal authority having proper jurisdiction.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014; 80 FR 43309, July 22, 2015]

§200.319 Competition

(a) All procurement transactions must be conducted in a manner providing full and open competition consistent with the standards of this section. In order to ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals must be excluded from competing for such procurements. Some of the situations considered to be restrictive of competition include but are not limited to:

- (1) Placing unreasonable requirements on firms in order for them to qualify to do business;
- (2) Requiring unnecessary experience and excessive bonding;
- (3) Noncompetitive pricing practices between firms or between affiliated companies;
- (4) Noncompetitive contracts to consultants that are on retainer contracts;
- (5) Organizational conflicts of interest;
- (6) Specifying only a “brand name” product instead of allowing “an equal” product to be offered and describing the performance or other relevant requirements of the procurement; and
- (7) Any arbitrary action in the procurement process.

(b) The Non-Federal entity must conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state, local, or tribal geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographic preference. Nothing in this section preempts state licensing laws. When contracting for architectural and engineering (A/E) services, geographic location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

(c) The Non-Federal entity must have written procedures for procurement transactions. These procedures must ensure that all solicitations:

- (1) Incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description must not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative

nature of the material, product or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a “brand name or equivalent” description may be used as a means to define the performance or other salient requirements of procurement. The specific features of the named brand which must be met by offers must be clearly stated; and

(2) Identify all requirements which the offerors must fulfill and all other factors to be used in evaluating bids or proposals.

(d) The Non-Federal entity must ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the non-Federal entity must not preclude potential bidders from qualifying during the solicitation period.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014]

§200.320 Methods of Procurement to be Followed

The non-Federal entity must use one of the following methods of procurement.

(a) Procurement by micro-purchases. Procurement by micro-purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (\$200.67 Micro-purchase). To the extent practicable, the non-Federal entity must distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the non-Federal entity considers the price to be reasonable.

(b) Procurement by small purchase procedures. 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. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources.

(c) Procurement by 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. The sealed bid method is the preferred method for procuring construction, if the conditions in paragraph (c)(1) of this section apply.

(1) In order for sealed bidding to be feasible, the following conditions should be present:

(i) A complete, adequate, and realistic specification or purchase description is available;

(ii) Two or more responsible bidders are willing and able to compete effectively for the business; and

(iii) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

(2) If sealed bids are used, the following requirements apply:

(i) Bids must be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids must be publicly advertised;

(ii) The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;

(iii) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;

(iv) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and

(v) Any or all bids may be rejected if there is a sound documented reason.

(d) Procurement by competitive proposals. The technique of competitive proposals is normally 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. If this method is used, the following requirements apply:

(1) Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals must be considered to the maximum extent practical;

(2) Proposals must be solicited from an adequate number of qualified sources;

(3) The Non-Federal entity must have a written method for conducting technical evaluations of the proposals received and for selecting recipients;

(4) Contracts must be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and

(5) The Non-Federal entity may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated, and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services though A/E firms are a potential source to perform the proposed effort.

(e) [Reserved]

(f) Procurement by noncompetitive proposals. Procurement by noncompetitive proposals is procurement through 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 noncompetitive proposals in response to a written request from the non-Federal entity; or

(4) After solicitation of a number of sources, competition is determined inadequate.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014; 80 FR 54409, Sept. 10, 2015]

§200.321 Contracting with Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus area Firms.

(a) The Non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

§200.322 Procurement of Recovered Materials

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

[78 FR 78608, Dec. 26, 2013, as amended at 79 FR 75885, Dec. 19, 2014]

§200.323 Contract Cost and Price

(a) The Non-Federal entity must perform a cost or price analysis in connection with every procurement action in excess of the Simplified Acquisition Threshold including contract modifications. The method and degree of analysis is dependent on the facts surrounding the particular procurement situation, but as a starting point, the non-Federal entity must make independent estimates before receiving bids or proposals.

(b) The Non-Federal entity must negotiate profit as a separate element of the price for each contract in which there is no price competition and, in all cases, where cost analysis is performed. To establish a fair and reasonable profit, consideration must be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

(c) Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred, or cost estimates included in negotiated prices would be allowable for the non-Federal entity under Subpart E—Cost Principles of this part. The non-Federal entity may reference its own cost principles that comply with the Federal cost principles.

(d) The cost plus a percentage of cost and percentage of construction cost methods of contracting must not be used.

§200.324 Federal Awarding Agency or Pass-Through Entity Review.

(a) The Non-Federal entity must make available, upon request of the Federal awarding agency or pass-through entity, technical specifications on proposed procurements where the Federal awarding agency or pass-through entity believes such review is needed to ensure that the item or service specified is the one being proposed for acquisition. This review generally will take place prior to the time the specification is incorporated into a solicitation document. However, if the non-Federal entity desires to have the review accomplished after a solicitation has been developed, the Federal awarding agency or pass-through entity may still review the specifications, with such review usually limited to the technical aspects of the proposed purchase.

(b) The Non-Federal entity must make available upon request, for the Federal awarding agency or pass-through entity pre-procurement review, procurement documents, such as requests for proposals or invitations for bids, or independent cost estimates, when:

(1) The Non-Federal entity's procurement procedures or operation fails to comply with the procurement standards in this part;

(2) The procurement is expected to exceed the Simplified Acquisition Threshold and is to be awarded without competition or only one bid or offer is received in response to a solicitation;

(3) The procurement, which is expected to exceed the Simplified Acquisition Threshold, specifies a "brand name" product;

(4) The proposed contract is more than the Simplified Acquisition Threshold and is to be awarded to other than the apparent low bidder under a sealed bid procurement; or

(5) A proposed contract modification changes the scope of a contract or increases the contract amount by more than the Simplified Acquisition Threshold.

(c) The Non-Federal entity is exempt from the pre-procurement review in paragraph (b) of this section if the Federal awarding agency or pass-through entity determines that its procurement systems comply with the standards of this part.

(1) The Non-Federal entity may request that its procurement system be reviewed by the Federal awarding agency or pass-through entity to determine whether its system meets these standards in order for its system to be certified. Generally, these reviews must occur where there is continuous high-dollar funding, and third-party contracts are awarded on a regular basis;

(2) The Non-Federal entity may self-certify its procurement system. Such self-certification must not limit the Federal awarding agency's right to survey the system. Under a self-certification procedure, the Federal awarding agency may rely on written assurances from the non-Federal entity that it is complying with these standards. The non-Federal entity must cite specific policies, procedures, regulations, or standards to be in compliance with these requirements and have its system available for review.

§200.325 Bonding Requirements

For construction or facility improvement contracts or subcontracts exceeding the Simplified Acquisition Threshold, the Federal awarding agency or pass-through entity may accept the bonding policy and requirements of the non-Federal entity provided that the Federal awarding agency or pass-through entity has determined that the Federal interest is adequately protected. If such a determination has not been made, the minimum requirements must be as follows:

(a) A bid guarantee from each bidder equivalent to five percent of the bid price. The “bid guarantee” must consist of a firm commitment such as a bid bond, certified check, or other negotiable instrument accompanying a bid as assurance that the bidder will, upon acceptance of the bid, execute such contractual documents as may be required within the time specified.

(b) A performance bond on the part of the contractor for 100 percent of the contract price. A “performance bond” is one executed in connection with a contract to secure fulfillment of all the contractor's obligations under such contract.

(c) A payment bond on the part of the contractor for 100 percent of the contract price. A “payment bond” is one executed in connection with a contract to assure payment as required by law of all persons supplying labor and material in the execution of the work provided for in the contract.

§200.326 Contract Provisions

The non-Federal entity's contracts must contain the applicable provisions described in Appendix II to Part 200—Contract Provisions for non-Federal Entity Contracts Under Federal Awards.

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