

“HOW TO” PURCHASING MANUAL FOR THE FORSYTH COUNTY SCHOOL SYSTEM

BOOKKEEPER AND SECRETARY EDITION

A Practical Guide to Understanding and Navigating
the Purchasing Function of the Forsyth County
School System As It Relates To Bookkeepers,
Secretaries, and Administrative Assistants



PURCHASING DEPARTMENT

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To All FCS Bookkeepers, Secretaries and Administrative Assistants:

As noted by the address, this letter, and corresponding manual, is intended for those FCS employees who deal with the “administrative” functions of purchasing. I’m certain that I have not accurately addressed the entire intended audience by job description. However, the contents are provided to those who perform the day-to-day job tasks related directly to the expenditure of District monies. Our desire is that this manual would serve as another “tool in the tool bag” that assists you in the effective, efficient, legal and ethical completion of these critical job duties.

Please note that this manual is not policy or regulation, but that it is a supplement intended to explain, support, and further develop the concepts of policy and regulation. A “how-to” manual if you will... Therefore, this handbook will follow the format of policy and regulations as they pertain to purchasing and will also include some additional information, tips, and a Q&A from past questions and “real-life” implementation.

We understand that some of these procedures are new and that they may seem tedious or unnecessary. I can ensure you, that as we have planned and implemented the role of centralized purchasing within FCS (and its corresponding rules and regulations) we have made our best attempt to implement only those policies necessary to establish and support a sound public purchasing procedure. All of the elements of our policy and regulations are consistent with relevant Federal, State, and Local laws; as well as, are consistent with sound procurement practices supported by the National Institute of Governmental Purchasing and peer school systems within the State of Georgia. Please know that we have intentionally designed this system to cover the material elements of the expenditure of public funds without filling it with burdensome and laborious “rules”. Thus, we believe that this manual, and the regulations it supports, when followed will ensure that FCS is compliant with our legal and ethical obligations as stewards of public funds.

We anticipate that the regulations and manual will need to be updated from time-to-time. Laws can change unforeseen, or the Board can implement new directives involving purchasing related matters. If and when, we will update and keep you informed. In the meantime, please continue to familiarize yourself with the contents of our purchasing policy, purchasing regulations, and this handbook. In addition, please remember that we are always available to assist in the interpretation or implementation of these, or any purchasing related matters.

Finally, thank you for all that you do regarding the safe expenditure of FCS funds. You are on the “front line” as you daily administer the business of our school system. Your efforts are valuable and do not go unnoticed. This manual is not written because there are known major flaws in our purchasing methodology, but is offered as a “next step” in our joint-effort to continually improve this important job function within the premier school system in the State of Georgia.

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The Basics of Public Purchasing

What is Public Purchasing? The process of economically obtaining supplies and services for public purpose and use. (NIGP, 2007)

Purchasing as a source of acquisition: The act and function of responsibility for the acquisition of equipment, materials, supplies, and services. In a narrow sense, the term describes the process of buying. In a broader sense, the term describes determining the need, selecting the vendor, arriving at a fair and reasonable price and terms, preparing the contract or purchase order, and following up to ensure timely delivery. (NIGP)

Who is purchaser? Anyone involved in any step of this process. Most likely, you are reading the manual because you are involved, in some measure, in one or more of these steps.

Therefore: We must all be aware of the purchasing process as a whole, so that we can understand how our particular job function ultimately “fits” into the purchasing effort of our school system.

What is public money? Money acquired, primarily through tax, from the citizens for the purpose of government operation. The government purchases and consumes goods and services intended to create future benefit (in this case education) Therefore, it is not our money, other than the authority granted by the State and the Board of Education to expend.

Dual Purposes? Therefore, we as authorized and defined “purchasers” have a dual role:

1. Economically obtain supplies and services for public use (education)
2. Recognize our role as stewards of public money.

Challenging? It can be, but sheds light into why there are so many related rules and policies tied to the expenditure of public money.

Scary? It should not be. The purpose of these rules and this manual is to inform you regarding the laws and “best practices” pertaining to public purchasing. By learning, implementing and practicing the purchasing procedures set forth by FCS, one can operate in confidence that they are performing these essential tasks in compliance of relevant laws and ethical standards, which should lead one to feel...

Empowered! Empowered to perform these task in confidence, knowing that your role is vital to operational efficiency and effectiveness of FCS and to all its stakeholders (students, teachers, employees, tax payers, and local business). The authority and autonomy granted as purchasers for FCS comes with great responsibility and empowerment to make a significant and positive impact on our school system, community, and State.

Who, What & Why?

WHO: The Purchasing Department currently consists of three employees:
Director of Procurement-Brad Richardson- 210107 or bradrichardson@forsyth.k12.ga.us
Purchasing Coordinator-Trey Tryan- 210108 or ttryan@forsyth.k12.ga.us
Procurement Technician – Tammy Ridings - 210105 or tridings@forsyth.k12.ga.us
We report directly to CFO Larry Hammel in Finance and Business Services

WHAT: The Purchasing Department exists as a support function for all FCS stakeholders including, but not limited to, students, schools, departments and staff, the Board of Education, vendors and the citizens of Forsyth County. Our goal is to guide the purchasing effort of the entire district by implementing appropriate regulations, services, contracts, consultation, and coordination in an effort to equitably meet the needs of the aforementioned stakeholders; and to do so in the most legal and ethical manner. As a school system, we currently operate as a combination of centralized and decentralized structure. Which means that we are highly active in some purchasing functions, while other functions are still delegated to individual schools and departments.

WHY: Due to the significance and complexity associated with the expenditure of tax-payer funds, governments have established layers of policies, rules, and regulations in an effort to maintain the highest levels of accountability and integrity. In addition, “best practices” and usual and customary standards have evolved within the industry that support these concepts in the day-to-day operation of public purchasing. Therefore, we are charged with establishing procedures that protect the integrity of the purchasing process as a whole. In most cases, these procedures result in an effective and efficient expenditure of funds. In some cases, they can slow the process as a result of these built in “checks and balances.” Those who spend tax-payer money hold a high level of public trust which results in these series of procedures, approvals and audits. Everything we do is public record, open and transparent. In our world the old adage is true, *“Things not only have to be correct, they have to appear correct”*.

Finally, procedures and best practices are only as good as the paper they are written on unless they are properly:

1. **Communicated-** It is the responsibility of the Purchasing Department to convey these concepts and to continually educate the employees of the Forsyth County School System. Therefore, we are committed to meeting this need through the distribution of information found in this packet, on our website, through memos and emails, and most of all by providing service to you, our customers. Please contact us at any time, for any reason with any purchasing related questions and/or concerns.
2. **Exercised-** The communication of these practices and concepts will only be effective when they are implemented and exercised. Thus, both the purchasing department and the schools/departments hold an important stake in the purchasing effort of FCSS. Please familiarize yourself with these Purchasing Procedures so they you are able to put them in practice and so that you are able to share the importance of these concepts to those within your department/school.

Purchasing Procedures Breakdown and Highlights

The intent of this next section is to breakdown the key components of the Purchasing Procedures and to highlight features relevant to the administrative functions of purchasing. Please remember that our Purchasing Procedures are written to all levels of stakeholders involved in the procurement of goods and services for FCS, including all levels of staff and vendors. It is important to be familiar with the key points that pertain to your degree of participation.

Part I Operational Procedures

This opening section details the overall purchasing function including delegated purchasing authority from the Board all the way through to end users/departments. It serves as enabling legislation authorizing the School System and its employees, as detailed, to make purchases on behalf of the Board of Education.

This section also delineates between regular purchases and construction purchases (capital). There are some State Mandated rules that apply to construction, which are not applicable to general fund purchases.

Unauthorized purchases are also defined in this part of the Procedures Manual. It is important to note that the School System is not bound by any purchase made outside of the rules of these procedures. Thus, the school, or the individual making the purchase could be liable for any purchased not authorized by these regulations. Finally, please note the clause pertaining to Purchasing Ethics.

Part I I Responsibilities

Part II is self-explanatory as it details the responsibilities of each party potentially involved in the purchasing process.

The key element of Part II pertains to the clause entitled “Purchasing with Public Funds” As noted, public education is unique in its various and numerous sources of funding. These regulations prevail when any portion of the funding is from a public source. Schools are not bound to these regulations when expending “local funds”; however, we would recommend following the same or similar protocol in order to maintain a uniformed and defensible local purchasing system.

Part III Purchasing and Award Methods

This is the section most relevant with what you do day-in and day-out. It begins by defining competition thresholds and detailing what is necessary at each level of spend. Please note some key considerations pertaining to **Competition Thresholds**:



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- Competition thresholds do not apply if/when you are purchasing something that has already been competitively solicited such as Office Supplies, HP Toner, PE Supplies etc.
- These thresholds apply to the total purchase and not to individual line items. For example, if the total requisition exceeds \$5,000, then two prices are required; three prices are required if it exceeds \$10,000 etc.
- Splitting Purchase orders to circumvent purchasing limits is strictly prohibited. This is a violation of purchasing procedures and may delay your PO approval.
- This is not the same as PO approval levels
- Please pay close attention to the documentation requirements at each limit level. It is not necessary to submit this documentation to purchasing at the time of order, but you are required to keep detailed records that support the purchasing decision in case of audit.
- There may be times when the purchaser attempts to meet the competition requirements, but cannot do so due to a lack of competition. If this occurs, then document the file by detailing the circumstances limiting competition and your attempts to meet the respective requirement.

Special Purchasing Considerations are defined as those purchases made with exceptions to full and open competition. When properly utilized and cited, these factors absolve the purchaser from the responsibility of meeting the competition threshold requirements listed above. Below are some comments pertaining to each:

- **Emergency-** Self-explanatory, purchaser should make the “best value” decision considering all unique circumstances involved with the respective emergency.
- **Academic Prerogative-** This exception addresses the necessity for educators to select at their discretion the materials, curriculum, and services that best support the academic process. The purchaser should still remain cognizant of cost, but is authorized to make purchasing decisions, specifically related to academics, that “fit” the goals and objectives for learning as determined by the Board of Education, the Strategic Plan and the Department of Academics and Accountability. Please note that this citation should only be used as defined in the regulation manual (academic products and services) and that the person citing Academic Prerogative is responsible for defending the validity of its use.
- **Sole Source-** Sole Source is defined in the regulation and is the only Special Purchasing Consideration that requires prior approval. Please follow approval instructions as found in the regulation and cite the PO Approval Number on all purchases.
- **Sole Brand-** FCS reserves the right to specify particular products as Sole Brand and this section details the process.
- **Other Governmental Sources-** This includes State Contract, cooperative purchasing, or “Piggybacking” off of other government contracts. Note that this is an exception because the product/service has already been solicited by another governmental entity.
- **Blanket Purchase Agreements-** This is the only time that a requisition should be entered after the product/service has been obtained. Please note that it does not absolve the purchaser from following competition thresholds, but is in effect for certain types of purchases. Please consult the purchasing regulation or call purchasing for more information or to see if your purchase qualifies for this designation.

- **Board Exemption-** This list details certain product/services that the Board has exempted from typical solicitation requirements due to one or more unique characteristics. Please note that the purchaser should still use sound judgment when awarding these purchases as it is not a license to spend without justification, but does enable the purchaser to use best judgment on certain expenditures.

Part IV Requisition, Purchase Orders, and Approval

Part IV is also very tangible in the day-to-day purchasing efforts at the administrative level. Please see notes pertaining to this section:

- **Requisition Entry-** All purchases involving “District” money (non-local) should be run through Munis in accordance with the Finance Departments rules and procedures.
 - All Requisitions exceeding \$5,000 must include the notation justifying the purchase according to the competition thresholds described in Part III. You are not required to provide specific solicitation information, but should note that the requirement has been met. You must also include notation if your purchase is justified by a Special Purchasing Consideration. For example:
 - “Three prices quoted and on file”
 - “Academic Prerogative”
 - “Sole Source SS011309”
 - “Bid B08-02-HP Toner”
 - “Board Approved Contract 10/17/08”
 - Any requisition exceeding 5K must be accompanied by this notation including recurring monthly costs, service contracts, exempt items, etc.
 - *A person entering a requisition is ultimately responsible for the purchase and should know and be able to justify the purchase against procedural requirements.*
 - Please note, this procedure should not be viewed as a hindrance, but is in place to protect the person entering the requisition, all approvers, and ultimately FCSS in case of audit. As a rule of thumb, if the purchaser does not know what to cite, they could be in jeopardy of entering an “unauthorized purchase.”
 - **Unless associated with a Blanket Purchasing Agreement or Emergency as defined in the Purchasing Procedures, requisitions should not be entered after a product/services has already been ordered and/or received. This defeats the primary purpose of having an approval process. In addition, a purchaser, purchasing department, or school could be held liable for any order procured before approval.**
- **Approval Requirements-** These levels are different from the spending levels associated with competition thresholds. Instead, these pertain to the differing levels of approvals.
 - With the exception of some academic/book purchases, approval limits cover all purchases regardless of the method of procurement. In other words, a product purchased from a State Contract or Exempt list must still be Board Approved if it exceeds \$100,000.

- Please read the clause pertaining to contracts. Schools/departments should be extremely cautious when entering into contracts for goods and services. Read the fine print and make sure the agreement is compliant with these procedures. Purchasing is always available to consult and assist on any purchasing related contract.

Part V and Part VI Competitive Solicitation and Contract Provisions

These two sections pertain mostly to our formal competitive solicitation process and contracts. It details contract provisions, terms and conditions, and processes associated with doing business with FCS. While it is good to understand these terms, the intended audience for these sections is the marketplace and those FCS employees responsible for formal Bids, RFPs and Contracts.

Part VII Vendor and External Relations

Part VII is information intended for both FCS employees and vendors. Listed below are a few comments pertinent to the administrative job function.

- **Sales Calls-** You are not required to meet with vendors, although there may be times when it is to your advantage to do so. I suggest sticking to an appointment only format to ensure that you see them at your convenience. Feel free to forward over-aggressive or unprofessional vendors to the Purchasing Department.
 - Please note that, other than vendors who have been awarded contracts with FCSS, Purchasing does not typically endorse specific vendors. Be wary of vendors claiming to be endorsed to sell by Purchasing, especially those selling products that we already have contracts in place (IE toner, office supplies, copiers etc).
 - Even though we clearly disclose otherwise, some vendors believe that if they fill out a vendor application, then they are “approved” and they will present themselves as such. Again, the only vendors “approved” are those who have been awarded contracts based on a competitive solicitation (we list these on the Purchasing website). Others can be used as long as the product is not currently on contract and normal competition threshold considerations are met.
- **Vendor Performance-** Purchasing is very interested in the performance of our contracted vendors. In many cases, we are not aware of their performance without your feedback. For this purpose, we have created the Vendor Performance Form. We are eager to receive both negative and positive feedback from our vendors and will do our best to help you resolve any issues that you might have regarding contract performance.
- **Donations-** Please understand this provision if your school/department is considering donations.
- **Public Access-** State law affords any individual the right to obtain information to any purchasing related transaction. This clause explains the right of the public to obtain this information under the Georgia Open Records Act. Please consult the Public Information and Communications department if you receive a direct inquiry.

Vendor Management

One of the primary job responsibilities assigned to Purchasing is vendor management, particularly as it relates to the Munis Financial System. Since all county money must be spent through vendors in Munis, the set-up and management of this system is a key component supporting your purchasing efforts. This section will discuss these concepts and practices.

- **Vendor Application-** Any company or individual desiring to do business with FCSS must, at a minimum, submit two things. First is the Vendor Application and the second is a copy of their W-9 form. Both of these forms together are required before purchasing will enter a new company into Munis. Note the following:
 - It is not your responsibility to fill out a vendor application. In fact, you should only instruct them of its necessity and where to find it. If they want to do business, then it is their sole responsibility to submit the required documentation.
 - State Auditors require us to obtain and keep their Federal W-9 forms on file. If they are a legal company doing business and paying taxes, then they will have a Federal Tax ID number. If they are an individual and do not have a W-9, then they are required to submit their Social Security number for tax purposes.
- **Vendor Maintenance-** If you are aware of billing or contact information, then please forward that information to Tammy Ridings who will update the vendor profile.
- **Vendor Status-** Munis offers several designations pertaining to the status of the vendor. Listed below are comments on the designation most used by FCSS.
 - **Active-** A vendor must be “active” before a requisition/PO can be submitted. It does not mean that a vendor is “approved” to do business without consideration. The purchaser must meet competition requirements per regulations even when using an “active” vendor. Thus, the only “approved vendors” are those who have been awarded contracts through a competitive solicitation (IE central contracts). Many vendors, after submitting an application will present themselves as “approved”, which is not correct. New vendors are entered with a Stop unless they have been awarded a contract or a particular school/department has requested to purchase from them products not currently under contract. *Please be aware of the distinction between an “active” vendor and an “approved” vendor.*
 - **Stop-** A vendor with a “stop” designation cannot be used. As mentioned above, most vendors begin with a stop status. Note: “Inactive” is no longer used and has been replaced by “Stop” Existing vendors can be “stopped” for two primary reasons:
 - **Inactivity-** Vendors are routinely shifted from active to stopped when no activity has occurred with 18-24 months. This helps us manage a database that currently has over 8500 entries. A vendor stopped due to inactivity, can in most cases, be activated by request if you have a need to utilize their specific goods and/or services. Contact purchasing if this is the case.
 - **Performance-** Some vendors are stopped due to performance issues which are most often related to billing/finance. Vendors may also be stopped for poor performance relating to customer service, delivery issues, poor quality of product, or lack of support after the sale. In most cases, vendors stopped for performance related issues will not be reactivated.

Frequently Asked Questions (FAQ)

Listed below are answers to some of the most frequently asked questions. Please contact Purchasing directly if your question cannot be answered here, or if you need clarification.

Q: How do I get a new vendor added to Munis?

A: All vendors are required to complete a FCS vendor application and provide a recent W-9. This can be completed online on our website <https://www.forsyth.k12.ga.us/page/80>. Once our department receives the vendor application and W-9, a vendor number will be assigned and sent to the school or department making the request to let them know that particular vendor has been added to the system.

Q: Are we allowed to purchase from any vendor that is in the Munis database?

A: All vendors in the Munis database are subject to meeting the competition thresholds set forth in the FCS BOE Purchasing Policy and FCS Purchasing Procedures. Although some vendors in Munis have already been awarded a contract through competitive solicitation, **the Munis database is not a FCS approved vendor list.**

Q: Why does a vendor sometimes say “Stop” in Munis?

A: Vendors with a “Stop” status in Munis have either never won a competitive solicitation, have never been activated by request from a school or department for meeting a competition threshold, or have been stopped by the Finance Department for billing issues.

Q: Where can I find the list of centralized contracts that the Purchasing Department has put into place for the schools and departments to use?

A: The Purchasing Department webpage via the Intranet has a link titled “FCS Contract Detail List”. Here you will find approved vendors for various goods and services and thorough details of each contract.

Q: Do I have to order from one of the contracts we have in place on the “FCS Contract Detail List”?

A: FCS has a contractual and ethical obligation to purchase from approved bid vendors whenever possible. We highly encourage the use of these contracts where pricing or discounts have already been secured through competitive solicitation and in most cases shipping has already been included into the price of the good or service.

Q: Who do we contact to help resolve a problem we may have with one of the contracted vendors?

A: The Purchasing Department is always available to help resolve any issues with contracted vendors. We also ask that you fill out a Vendor Performance Evaluation Form available on our purchasing webpage. This form will remain on file and help us evaluate vendors for future solicitations. You should also fill out this form for good experiences with vendors as well.

Q: We have always bought from (insert vendor) in the past, can't I just buy from them again?

A: Maybe, but not necessarily. Unless the product/service is exempt or one of the defined "Special Purchasing Considerations" (IE sole source, state contract etc), then your purchase is subject to the competition requirements established in the Purchasing Procedures and Board Policy. Past business does not exempt competition on current or future orders.

Q: Why am I now required to submit notes on each requisition exceeding \$5,000 that justify the order against the competition thresholds.

A: This procedure is in place to protect the purchaser and purchasing agency in the event of audit. By entering this information, you are ensured of meeting your justification requirements. Please remember that the person submitting the justification is responsible for its defense in case of audit, so please be confident of the justification that you cite. Purchasing is always available to assist regarding these designations.

Q: Do I still have to submit the justification notes if it's a recurring charge, or the duplicate of a previous order?

A: Yes, any order exceeding \$ 5,000 must be accompanied by the appropriate notations. Please remember that an explanation of the purchase, or rationale behind the purchase does not satisfy this requirement as it specifically addresses the satisfaction of competition requirements mandatory in Board Policy.

Q: Are schools and/or departments required to involve the Purchasing Department on Quotes, Bids, RFP's (purchases exceeding 5K and requiring competition)?

A: No, purchasers are not required to use Purchasing to obtain the required competition. However, they are required to meet all of the solicitation requirements established by Policy and Procedure. Please note that formal solicitations (those exceeding 50K) have the most specific requirements, therefore, it is highly recommended that you work with Purchasing involving any solicitation exceeding 50K. This will ensure that you are compliant with all relevant policies, procedures, and laws, to which you will be accountable in case of audit, protest, or open record request.

Q: I have a question regarding budgets codes or funding, should I call purchasing?

A: No, purchasing is not involved with budget related issues, which are handled by Finance. This is designed as an intentional distinction between funding issues and purchasing.

Q: Who should I contact regarding warehouse issues (pricing, delivery, surplus)?

A: Please consult Support Services for issues pertaining to pick tickets, delivery of warehouse stocked items and surplus.

Q: My school wants to purchase some equipment using only "local" money and will do so with a local purchase order, what requirements do I need to consider?

A: By regulation, you are not bound to the same purchasing procedures if using 100% local funds. However, we recommend following the same or similar principles to ensure uniformity and sound practice. Even though local funds are designated differently, it would still be prudent to implement internal purchasing guidelines to manage all monetary resources.

Listed below are a few “tips and pointers” that may help increase your purchasing effectiveness and stretch your purchasing power. These principles and strategies will not fit absolutely in all situations. However, when known and practiced, these strategies may save some headaches and maybe a few dollars.

- **Quote Tips:** In addition to satisfying procedural requirements, seeking competition is the primary method we can use to reduce costs and stretch our ever shrinking budgets. Please consider the following regarding quotes:
 - Even though some purchases do not require written quotes, it is wise to obtain prices in writing when possible. This will provide you with more than “he said, she said” should the invoice pricing not match your purchase order.
 - Even though some purchases (under 5K) do not require multiple prices, it is wise to obtain 2-3 quotes when reasonable and possible. It is common to go back to the same vendors that we have used in the past. They are aware of this as well, which often results in “price creep” when they presume there is no competition. Sometimes all it takes is knowledge of competition to ensure that we are receiving the optimum price.
 - On written quotes, it is best to specify certain terms and conditions that are important to protect your purchase. If not, the vendor will dictate the terms, which are always stacked heavily in their favor. Terms to consider include, but not limited to:
 - **Freight**-who pays and how much, and does it make a difference?
 - **Freight responsibility**- always designate FOB Destination- this pertains to who is responsible for handling a freight claim in the event something is damaged in transit. FOB shipping dock means that you are responsible for the freight once it is loaded on the carrier.
 - **Tax Status**- be sure to inform of our tax status to ensure we are not charged tax.
 - **Notice of Right**- always include language that reserves the right of FCS to award the quote in the most beneficial terms to FCS. To accept or reject any quote and waive any irregularity.
 - **Documentation**- keep accurate records of who you spoke to, when you spoke, and the specifics of the conversation.
 - Purchasing has posted a Quote Boiler Plate for your use. Simply change the dates and enter your specific information, part numbers, requirements etc for use.
 - **Freight:** Freight is one area where vendors can substantially increase their profit margin, please consider the following when obtaining and evaluating offers:
 - The optimum way to consider freight is to require the vendor to include it in the price of the product quoted. This will allow you to consider all prices on a level playing field. A common tactic used in sales is to price the product cheap and make it up on freight. This eliminates this tactic.
 - Some vendors will claim that they cannot quote freight. In most cases this is not true, they choose not to quote freight so they have the ability to “bump” the actual charges.
 - Always ask for freight charges to include “handling”. Some vendors charge a separate handling charge which they will not disclose, but will show up on the invoice.
 - Be aware of vendors shipping breaks. Most vendors have thresholds by which they offer free or reduced shipping. Knowing these can help consolidate orders to take advantage of the best possible freight terms.

- **The worst possible way to pay freight is by percentage of invoice or percentage of product.** There is no consistent correlation between the cost of the product and the cost to ship. IE: Consider a computer parts order that costs \$3000 with 3% cost of invoice for freight. They would charge \$90 to ship some part that fits in a shoe box and weighs 4 lbs. That shipment actually would cost them 8-10 dollars. While there may be times you are required to do so, please avoid this method of freight.
- **Freight Summary-** shipping and handling charges are a profit maker for many companies. Be aware of this and get the freight quoted at the time they quote the product. They may not want to, but you are the customer and have the right to know. At the very least, any reputable company can provide a “not to exceed freight quote”.
- **Record Keeping-** by state law, all purchasing records must be kept for a period of seven years. This means that any “material” information pertaining to any purchases must be kept and available for inspection up to a period of seven years.
- **Requisitions and Purchase Orders:**
- To expedite the approval process, please include all required information on the requisition including sourcing notes as discussed.
- Please forward all “receiving documents” to Finance at your earliest convenience. They do not pay invoices until they are reconciled against your receiving documents. There are times when FCS might be able to take advantage of early payment discounts. In addition, there are negative consequences when invoices exceed 30 days due to delays in paperwork.
- When entering orders for centrally contracted items, please consult the purchasing contract page to check for updates regarding the contract (pricing, terms etc). We make every attempt to inform you of changes, but it is good to check the contracts that you use periodically.
- Do not enter a price into a requisition that is known to be wrong or just a guess. Please take the time in advance to find the correct pricing before entering the order. Failure to do so creates a great deal of unnecessary work on the back side.
- When possible, consolidate purchase orders made to the same vendor on the same day. It cost FCS between 75 to 125 dollars to process one PO. Consolidation of similar orders can increase efficiency and save the school system money.
- Knowledge is Power- please take the time to read and understand the purchasing policy, FCS procedures and supporting information (this How To guide and the web site). Not only will it keep you and your school/compliant, but it will also help you better manage your funds and monetary resources.
- Please familiarize yourself with contracts and pass that information along to those within your school. We have added some new contracts, such as music equipment, that could be useful in saving money and protection in terms and conditions.
- It is not possible to write procedures or guide books that exhaustively cover all potential scenarios regarding purchasing at the government level. However, the more we understand, the better equipped we are to discern the proper path and to navigate this important and highly visible job function.



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Vision Statement

To make a positive impact while becoming a recognized leader in governmental purchasing within the service of the Forsyth County School System and the field of public education.

Mission Statement

Our Mission is to support all Forsyth County School System stakeholders in the educational process by facilitating the purchase of quality goods and services through the use of cost effective, legal, ethical, and sound purchasing practices.

Core Values

Honesty and Integrity: Protect the integrity of the purchasing function of FCS by performing all job tasks in an accurate, open and truthful manner.

Trust and Respect: Base all internal and external relationships on trust and mutual respect.

Service: Strive to identify and meet the needs of all FCS stakeholders with responsive, courteous and professional customer service.

Accountability and Responsibility: Act responsibly in all endeavors and be accountable for the actions performed in the expenditure of taxpayer resources.

Communication: Place high importance on the value of open and transparent communication with all FCS stakeholders.

Ethics: Perform the duties and tasks required to fulfill the purchasing mission with the highest standard of ethics and morals.

Innovative: Proactively seek ways to improve and enhance performance in all aspects of the purchasing function while maximizing the value of each dollar spent.