

PURCHASING HANDBOOK

2019-2020 SCHOOL YEAR



Purchasing Website: <http://www.mpsaz.org/purchasing/>

MPS Buying Teams

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**Current contact information is maintained on the Purchasing Web Page.*

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NOTES

PURCHASING INTRODUCTION

The purchasing department is responsible for the acquisition of goods and services, and compliance to the State, School District Procurement Code, and Governing Board policy. This handbook is created in an effort to provide guidance and support to our end users as they navigate through the purchasing process. In addition to handbook we have a wealth of information available on our web-site.

Purchasing Home Page

www.mpsaz.org/purchasing/

mesa Purchasing
PUBLIC SCHOOLS

549 North Stapley Drive - Building 1
Mesa, Arizona 85203-7203
Phone (480) 472-0140

Home Staff District Wide Shredding

MPS Search

Welcome to the Purchasing Department of Mesa Public Schools. We are committed to spending MPS taxpayer dollars in the most efficient and effective manner. We invite you to utilize our website for answers to your purchasing questions.

We hope you will look for opportunities to partner with Mesa Public Schools. Please consider becoming a registered bidder by clicking the Vendor Resources link above. If you need additional information, don't hesitate to [contact us](#).

Vision, Mission, & Guiding Principles

PO Terms & Conditions

Buyer Information Pages
Current Contracts and Pricing

Accounts Payable Information
District Funds
PO # Beginning with Number 17

How To Do Business With MPS
Information for Vendors

Commodity Lists
Tab 1: By Buyer Team
Tab 2: By Commodity Type

Accounts Payable Information
Student Activity Funds
PO # Beginning with Number 91

MPS Conflict of Interest Guidelines

Intranet Resources for Mesa Public Schools Staff Only

Pro-Forma Invoice Form
Manual Invoice Form

Public Records Request

District Wide Shredding Program

Procurement Resources
Resources for Arizona School Districts

mesa Unprecedented Excellence in Education
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63 East Main Street · Mesa, Arizona 85201
MPS Home About Mesa Nondiscrimination Contact Us Translate

The “Purchasing Home Page” features the links to some of our most used data. The current contact information for all teams, the Buyer Information Pages, Commodity Lists, and Intranet Resources. It also provides links to other valuable resources for our vendors, staff, and purchasing community.

Buyer Information Pages

Each buying team has created and maintains the most current information regarding their awarded contracts, most commonly purchased items, and specialized instructions for procuring specific commodities if applicable. When making a purchase requisition we strongly recommend reviewing the “buyer team information” page for the most current information available.

Commodity Lists

The commodities are listed in two formats located on the Purchasing website:

Buyer Teams (lists commodity by team assignment)

https://docs.google.com/spreadsheets/d/19T19wn6cT-y8-wy55P6mwLmndK2UI6GBfiQJBr_QB10/edit#gid=740362311

Commodity Type (lists commodities in alphabetical order)

<https://docs.google.com/spreadsheets/d/1wP5QL5GbRytcxgppOMhYP83i2OyhINIHEfOLSpDV6g4/edit#gid=1462136282>

Intranet Resources for Mesa Public Schools Staff Only

This link provides District specific information, which requires an MPS Log-in to access the link. See below...

Purchasing Intranet Page



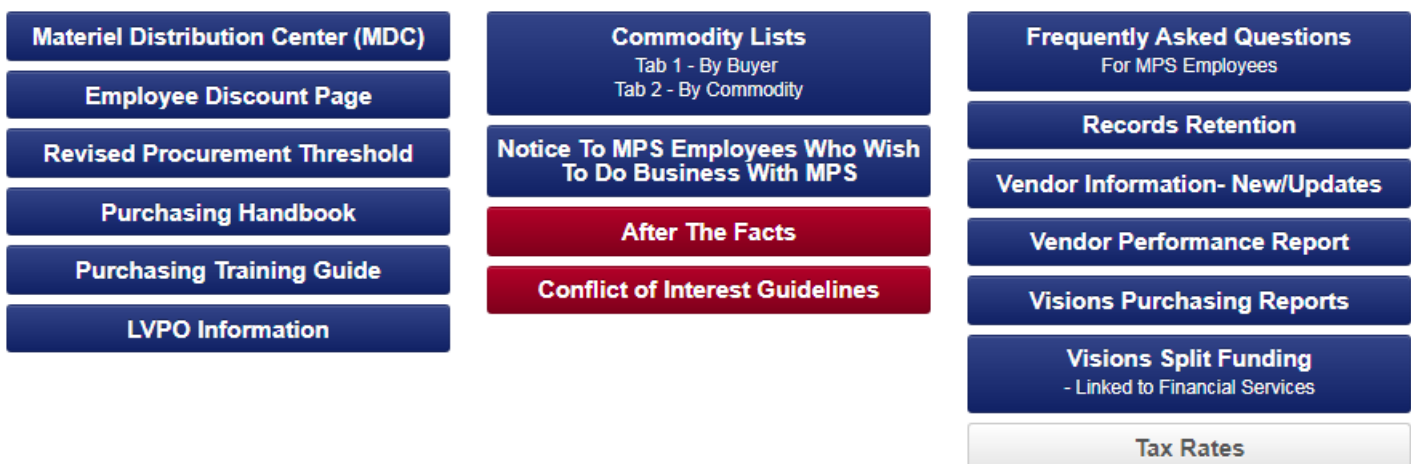
Purchasing Intranet Page

VISION STATEMENT

We envision the MPS Purchasing Department ethically leading the District through an efficient procurement process by working to effectively use public funds in support of quality education programs throughout our community.

MISSION STATEMENT

The MPS Purchasing Department will cooperatively communicate with the MPS community to lead the process of providing goods and services through innovative procurement methods.



The “Purchasing Intranet Page” provides you with links for more comprehensive information regarding the acquisition of goods and services. Below you will find the description and additional information regarding frequently processes.

Employee Discount Page

This page is offered as a courtesy to employees. The Purchasing department does not negotiate these discounts. It is available for informational purposes only. If you are aware of a vendor offering discounts to MPS employees or find the information listed is inaccurate, please contact the Purchasing secretary.

Procurement Threshold

A procurement threshold is the dollar amount in which the District is required to seek competition for the purchases. Below is a list of the thresholds

Procurement Threshold

- **\$1.00 - \$95,000** - Three written quotes are required
- **\$95,000 or more** - This large of a purchase requires a formal solicitation or contract. Typically, a solicitation can take up to two months to complete, from beginning to end. Consult Buyer team for your large purchases, as there may be other procurement options.

Please note: Procurement thresholds are based on the annual expenditure with a vendor or like commodity. If we spend more than \$9,500 annually with any one vendor or commodity then competitive procurement must be done.

For example, if one site spends \$6,000 with a vendor on paint and then another site wants to purchase goods or services totaling \$4,000 with the same vendor or a different vendor for paint, then competitive procurement must be done before the second order can be placed.

Blanket PO's must also follow the same rules and cannot be increased over the procurement limit. These same rules apply when using ECA Funding and Grant Money.

Please call the specific Buying Team regarding the vendor or commodity expenditure amount and the necessary quote requirements.

Financial Software System (Visions)

After many years of service, OBARS has been retired. The financial software program, Visions, has been implemented as of July 1, 2016.

Visions training materials, handouts and manuals can be found on the MPS Financial Services webpage
<http://www.mpsaz.org/finance/new-financial-system/trainingmaterials/>

For information regarding iVisions go to MPS Financial Services > Infinite Visions > Training Materials > iVisions Navigation
http://www.mpsaz.org/finance/new-financial-system/trainingmaterials/files/workflow_navigation_04_01_16.pdf

Visions Purchasing Reports can be found on the MPS Purchasing > Intranet Resources for MPS Staff Only > Visions Purchasing Reports <http://www.mpsaz.org/purchasing/intra/purchasingreports/>

Lifecycle of a Purchase Order

Pre-Requisition

- **Need a WORK REQUEST?** Submit to TMA System or INFORMATION SYSTEMS if installation of product will change the ceiling, walls or floor AND New Radio Requisitions (Buyer 7).
 - Are mounting brackets required?
 - Is there asbestos?
 - Is there sufficient electrical?
 - Is there sufficient network capacity?
- **Need QUOTES or BID?** Contact Buying Team. Obtain if necessary.
- **Ordering SOFTWARE?** Is it standard or non-standard? Obtain approval from Curriculum & Instruction vetting process before requesting. Website:
<https://docs.google.com/a/mpsaz.org/spreadsheet/viewform?formkey=dHZReXNKd000UVhsaVhVRmVXbGJM eXc6MQ#gid=0>
- **Verify funding** is available.
- **Do you have APPROVAL** from your site or department administrator?
- **Do you need a PO quickly?** Contact financial approver and buying team.
- **Do you need a TRAVEL REQUEST? YES, IF** you are a teacher ; **IF** you are traveling outside Maricopa County; or **IF** you are going over-night.
- **Do you need a check to prepay a registration, for admission, or to pay for services at the end of an event?**
Enter this information on the requisition and allow at least two weeks for check generation.

Requisitions

A requisition is required for every purchase in the District regardless of the source of funds. Also the requisition must be approved at all levels including Financial Services prior to a purchase order being prepared and approved. You may contact the intended vendor to obtain a price quote and delivery information, but, DO NOT REQUEST DELIVERY or place an order until a purchase order has been issued.

- Enter requisition into Visions reference the Visions Training Manual
<http://www.mpsaz.org/finance/new-financial-system/trainingmaterials/>
*Please remember to “save” your requisition when entering it into Visions.

INFORMATION TO BE INCLUDED ON REQUISITIONS

Internal Notes

- **Minutes**

PO Notes

- **Contact Person For Questions** (first and last name)
 - E-mail Address
 - Phone Number
- **Authorized Signor(s)** (first and last name)
- **Shipping Information**
 - “Free Shipping” or “Shipping is 10% of Subtotal”
- **Discount Information**
 - “Price reflects 10% discount”

Quotes

- Vendor quotes need to be attached to the requisition (in Visions).

Additional Information for Blanket PO's

- **Not To Exceed \$xxx Amount including tax**
- **List what the Blanket Total Includes**
 - “includes T-shirts, set up fees, tax & shipping”
- **Fundraisers**
 - “we will be increasing PO as needed”
 - **Buying teams have different procedures for Blanket PO's. Let Purchasing know if you want the Blanket PO to vendor (some buying teams do not typically send Blanket PO's to vendors).**
 - “school will place order, do not send PO to vendor”

Registration requisitions must include the following information:

- Who • What • When • Where • How much per person

Be sure to attach registration forms with the requisition (if they need to be sent to vendor) and tell us what you want Purchasing to do with the forms once the PO is processed.

Examples:

- “Registration attached, submit with PO to vendor”
- “Send PO to School Attn: (Name – address), School will complete registration AFTER the PO is issued” (secretaries now have the ability to print their own PO's)
- Travel Request Information if applicable

PO Notes – Authorized signors, contact information including phone number (including area code), dates

Misc:

- **When product is sent directly to the school/department**, and an item is out of stock or discontinued, notate on the packing slip or PO that the item will not be delivered and send it to MDC
- **All software or subscription requests** must include the name, phone number and e-mail address of the end user
- **Work order number for all installations.** For radio purchases, submit the work order using the following verbiage – ‘Assemble, program and deliver #__ Vertex Radios’.
- **Attach all back up documentation to the requisition in Visions**

Please Note:

- If the Vendor you are requesting to use is not listed in the Visions system, please email the vendor contact information to the Buying Team to have your vendor added.
- There are many standardized items that have been established by the District. Contracted pricing has been negotiated by the Purchasing Department. Please visit the *Buyer Team Information Pages* for contracted vendors, standard items and pricing.

Financial Approval

- Obtain Unit and Management Approval. If there is multiple funding, may need multiple people to approve. The approval process will be routed through iVisions.

Each purchase requisition must be properly coded and approved by the principal or department head so that the Financial Services Department may determine whether funds are available.

Upon receipt of a requisition, Financial Services will review it to ensure proper completion, including any required approvals. It is the responsibility of the principal or department head to give specific descriptions and accurate prices of the items whenever possible. Financial Services will approve your requisition. Through the Visions system, it will flow to Purchasing to determine the proper procurement procedure and to prepare your purchase order.

Purchase Order

Purchase orders are needed for every transaction that will require a vendor to be paid. You must obtain this approval in the form of a purchase order PRIOR to ordering any goods or services. This is true for Student Funds as well as ALL District Funds. It is also true for Fund Raising sales/events.

A Purchase Order is generated in the Purchasing Department after a requisition is entered by the requesting school or department. The two types of purchase orders are *line item purchase orders* and *blanket purchase orders*. The definitions of each are described below.

Line Item:

1. Separate lines for each item, receiving must be done to process payment
2. Each item is on a separate line
3. Item(s) physically received (tangible)
4. For “Items” when electronic receiving is needed

Blanket:

1. All items including tax are lumped together, need receipts, signature and date, and sent to AP/Student Funds, **do not** hold receipts until total \$ on purchase order is reached.
2. One line, total \$'s of purchase order cover cost of all items
3. Services, tax included in total price, explanation is in body of purchase order
4. Blanket purchase orders are not received electronically
5. For “Not to exceed \$XXX” receiving is not needed, can be used until \$'s are spent, signed/dated receipts need to be sent into Accounts Payable **as received**, so invoices (receipts) can be paid in a timely manner.
6. Specific amount or specific period of time included in the description of the items.
7. Description of items or services being purchased

Purchasing Steps

- Purchasing will verify all required paperwork is complete and the information is on the requisition.
- Purchasing will verify if a contract / quote / sole source determination is needed to meet the procurement guidelines as provided by the Auditor General / Arizona School District Procurement Rules.
(<http://www.mpsaz.org/purchasing – Revised Procurement Threshold>)
- Purchasing will determine if the product will be shipped to the school or department / MDC warehouse / or picked up.
- Purchasing will create and distribute the purchase order as directed by the requesting party. PO can be sent to the vendor and/or sent to the requesting party for hand delivery or check generation.
- For technology and AV requisitions – The respective buying team will verify the product is a district approved device or hardware. Then they will obtain quotes from the District contracted vendors. If necessary the PO will be generated to a different vendor than the one listed on the requisition.

Delivery

MDC Delivery:

- MDC will check the product in and verify part numbers/product match the PO. They will update Visions receiving then ship the product to the site as noted on the PO. A copy of the packing slip is provided to the site for their records.

Site Delivery/ Pick-up orders:

- Site will be responsible for verifying the product received are the correct items as noted on the PO. The receiving party at the site will then write the receiver's name on the PO, sign the PO and list the date received. The PO and packing slip/invoice will be sent to MDC Receiving via e-mail to: mps_receiving@mpsaz.org. (This is the preferred method over inter-office mail, individual email accounts, or fax.)
- If the site receives the invoice in lieu of a packing slip – the form must also include “Okay to pay” or “Okay to pay and close” when the order is delivered in full.
- MDC will then update the receiving in Visions.

Checking the status of your order

Please check the Receiving Report under the Purchasing Module > Reports > Receiving Report. If the item has not been received by MDC you may also call the vendor with your purchase order number regarding the status of your order. Or, you may call the Materiel Distribution Center to check on the status of a purchase order (472-0940). Be certain to have your purchase order number ready. If you need further assistance you may call the Buyer Team that issued the PO.

Invoicing

If a site receives the initial invoice, the requester/authorized signer needs to review the invoice to ensure all products on the invoice have been received. Authorized signor will sign the invoice, print their full name, write “Okay to pay”, and date the invoice, then sent to Accounts Payable or Student Activities.

In some instances the Vendor will not create an invoice. In order for a vendor to be paid, an invoice must be submitted. An invoice form is available at the MPS Accounts Payable website, under Documents.

http://www.mpsaz.org/accounts_payable/docs/files/blankinvtovendorupdated022515_1.doc

PO Completion

When all product / services has been received or completed, and all invoices are paid, the PO can be closed. If the PO was for the exact amount that is paid, the PO will close automatically after the final invoice is processed. If there is a remaining balance on the PO, verify all invoices are paid and send an e-mail to Purchasing requesting the PO be closed.

PO Issues

Wrong product / defective products received on PO's delivered direct to site

- Site will contact the vendor directly using the contact information on the packing slip. If the product is being returned to the vendor, a "Return Materials to Vendor" form will need to be completed. (Leave the invoice number blank). Make sure the product is shipped back to the vendor who was listed on the PO – not the requisition. MDC can ship the product back to the vendor but will require the RMA#, ship to address, and "Return Materials to Vendor" form.

Increasing a PO

Purchase Orders may not be increased without the approval of the site, the Financial Services and Purchasing Departments. In order to increase a PO after issuance, please email the request to the appropriate Buying Team (Buyer and Assistant). If the procurement threshold has not been exceeded the PO will be revised by the buyer. The revision will electronically go through the approvals.

LVPO Information

A Limited Value Purchase Order is a valid MPS purchase order that is issued directly to a vendor. They are approved at the school/department level but have a few restrictions. A list of prohibited items are found at this website http://www.mpsaz.org/purchasing/files/lvpo_prohibited_items.pdf

***Chemical purchases and technology items are prohibited under LVPO's (note: liquids and powders are considered to be chemicals).

For questions regarding LVPO's, contact Laura Santiago at <mailto:lmdeering@mpsaz.org> or 472-0149.

After-The Fact Purchase Orders

WHAT IS IT?

An “After-The-Fact” Purchase Order Is Any One Of The Following:

- a) a purchase order that is issued after an item has been received/pick-up
- b) a purchase order that is issued after a service has begun or been completed
- c) a preview item that is delivered without a purchase order and is then purchased
- d) calling in the order to the vendor prior to receiving a copy of the purchase order or at a minimum, an authorized purchase order number
- e) sending the purchase **requisition** to the vendor in advance of the purchase order
- f) making reservations or scheduling services without a purchase order



WHY IS AN “AFTER-THE-FACT” PURCHASE ORDER SO BAD?

- a) A purchase order is the only legal commitment to spend any funds
- b) A purchase order insures that procurement rules have been followed for the purchase and that budget funds have been properly approved
- c) Phoning or faxing your order in with a requisition leads to double shipments that may have to be charged to the school site
- d) Our auditors will note an “after-the-fact” purchase as a violation of the procurement rules

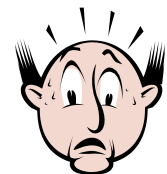
WHAT SHOULD WE DO?

- a) Wait until you have your purchase order in hand before ordering any goods or allowing any services to begin
- b) Submit “services” and “registrations” requisitions at least two (2) weeks prior to start of services and list actual start date of contract or the actual conference dates
- c) Contact Purchasing if you need any help expediting your order
- d) If you’re not sure about a particular purchase, contact purchasing right away



WHAT ARE WE PROHIBITED FROM DOING?

- a) Do not fax/phone in purchase **requisition**, wait until you have the purchase order in hand
- b) Do not list start date on contract as the date you signed the consultant contract
- c) Do not allow a consultant to begin working without a purchase order
- d) Do not order a preview item without a purchase order
- e) Do not make any reservations without a purchase order



A purchase made without a purchase order is a violation of the procurement rules and could result in the employee making the purchase being held personally liable for the purchase.

Contact the Purchasing Department at 472-0150 if you have any questions or special circumstance **before** making the purchase. We want to help make the purchase as efficient as possible.



Conflict of Interest Guidelines **State Law and MPS Policy**

Arizona Revised Statute §38-504.C prohibits public employees from accepting any gift or gratuity that would improperly influence the performance of his or her duties or judgment:

A public officer or employee shall not use or attempt to use the officer's or employee's official position to secure any valuable thing or valuable benefit for the officer or employee that would not ordinarily accrue to the officer or employee in the performance of the officer's or employee's official duties if the thing or benefit is of such character as to manifest a substantial and improper influence on the officer or employee with respect to the officer's or employee's duties.

MPS governing board policy GBCA – Staff Conflict of Interest implements state law but is more broadly prohibitive:

No employee will accept or solicit, directly or indirectly, anything of economic value as a gift, gratuity, favor, entertainment or loan that is, or may appear to be, designed to influence the employee's official conduct. This provision will not prohibit acceptance by an employee of food or refreshments that are incidental to a business meeting, or unsolicited advertising or promotional material of nominal value.

No gift or gratuity that “may appear to be designed” to influence an employee's official conduct may be accepted. Employees should bear in mind that the question of a gift's influence is not whether the employee believes that the gift would influence his or her judgment, but whether a reasonable person observing the relationship between the vendor and employee would feel that the gift may influence the employee's judgment. The few exceptions to this rule are (i) food/beverages of nominal value received at a business meeting, (ii) advertising or promotional items of nominal value, and (iii) participation in vendor-sponsored prize drawings or free meals if offered to all attendees at a professional association conference.

Specific Guidelines are noted at the following link:

https://docs.google.com/document/d/11coy_-hsfPxCKTXivYvBdJf0bf-aa52tPjw7sA9TyZs/edit

Please note that there are also conflict of interest guidelines that are applicable when purchasing from a District employee, family member, or Governing Board Member. Please contact the Purchasing Department directly for guidance on handling this type of conflict.

Vendor Performance Report

The District has developed a form to report and comment on vendors for feedback to the Purchasing Department. You may utilize this form to document vendor performance (good or bad) and we will follow up with the vendor with any appropriate action needed. By documenting vendor performance, we are able to retain strong vendors and eliminate vendors not performing to the District's expectations. This form can be found at the following link:
<https://docs.google.com/document/d/1iNWYdxEj6xuHIFHOdCko47KzI0N7V3pt7FEYi39sQCo/edit>



VENDOR PERFORMANCE REPORT

Use this form to report vendor performance that does not conform to the terms of the contract (or generally accepted standards) and requires corrective action by the Purchasing Department.

Part 1 Issues

Department or School: _____

Contact: _____ Phone#: 472- _____

Vendor: _____ PO #: _____ Bid or Contract #: _____

Describe the issue: _____

Requested Action: _____

Or, if this is only a report (no action required), Check Here: _____

Signature Department/School Administrator: _____

.....
The Buyer will forward a copy of this report, to the vendor, for response. See next page for vendor response and action items.

Part 2 Vendor Notification

TO: _____ **ATTN:** _____
COMPANY NAME AND ADDRESS VENDOR REP

Please review the issues outlined on the reverse side of this report. A response and suggested remedy should be provided below or attached to this report:

Additional information and instructions may be obtained by contacting the Buyer.

Part 3 Purchasing Department Action

Action taken by Purchasing Department (Buyer):

Check all that apply:

- File report _____
- Remove Vendor from Bid List: _____
- Cancel Contract _____
- Notify Bond Company _____
- Request Debarment _____
- Second Report _____ Date of Previous Report _____

Date Sent to Vendor: _____
Buyer Name: _____
Signature of Buyer: _____

Vendor Solicitations

The school district may not actively distribute vendor information; i.e., hand out promotional flyers, sell items on District property, and/or hand out promotional posters without permission from Helen Hollands in Communication and Marketing Department 472-0223.

Common Chemicals

Common Items Considered to be Chemicals...

Chemicals cannot be purchased on LVPO's or Blanket PO's

Any Liquids or Powders = Chemicals

- * Alcohol (Isopropal)
- Ammonia
- Antiseptic Sprays (Lysol)
- * Bleach
- * Board Cleaner
- Body Lotion
- Cleaner - All Purpose (409)
- Cleaner - Glass (Windex)
- Cleaning Powders (Comet, Ajax)
- Cleaning Solutions (Lysol, Mr. Clean, Lime-A-Way)
- * Correction Fluid (white out)
- * Deodorizer Sprays
- Dish detergent
- Epoxy
- * Eye Drops
- Fabric Softener - liquid
- Fertilizers
- Glitter Paint
- * Glue
- Hand Lotion
- * Hand Sanitizer
- Hand Soap - Liquid
- Helium
- * *Indicates items available in the MPS Warehouse*
- Hydrogen Peroxide
- Insecticide
- Laundry detergent
- Liquid Light
- Liquid Nails
- * Lubricating Sprays (WD 40)
- Mineral Oil
- Motor Oil
- * Paint
- Photo Developer
- PVC Cement/Primer
- * Sanitizing Wipes
- Shellac
- Spray Paint
- Stomach Relief (Peptobismal)
- Sunblock
- * Tempera Paint
- Valve Oil
- * Water
- Weed Killer
- * Wipes - Cleaning, Hand, Disinfecting, Sanitizing
- Wood Stain

Conventions for Abbreviations

(Visions Vendor Name Abbreviations)

American	AMER
Arizona	AZ
Association	ASSOC
Company	CO
Corporation	CORP
Department	DEPT
District	DIST
Education	ED
Educational	EDUCTL
Equipment	EQUIP
Foundation	FDTN
Incorporated	INC
International	INTL
Limited Liability Company	LLC
Manufacturing	MFG
Mountain	MTN
National	NATL
Organization	ORG
Phoenix	PHX
Service	SERV
Supply	SPLY
System	SYS
Technology(ies)	TECH
University	UNIV

□

Trade In Equipment or Materials

Trade In Values for Mesa Schools

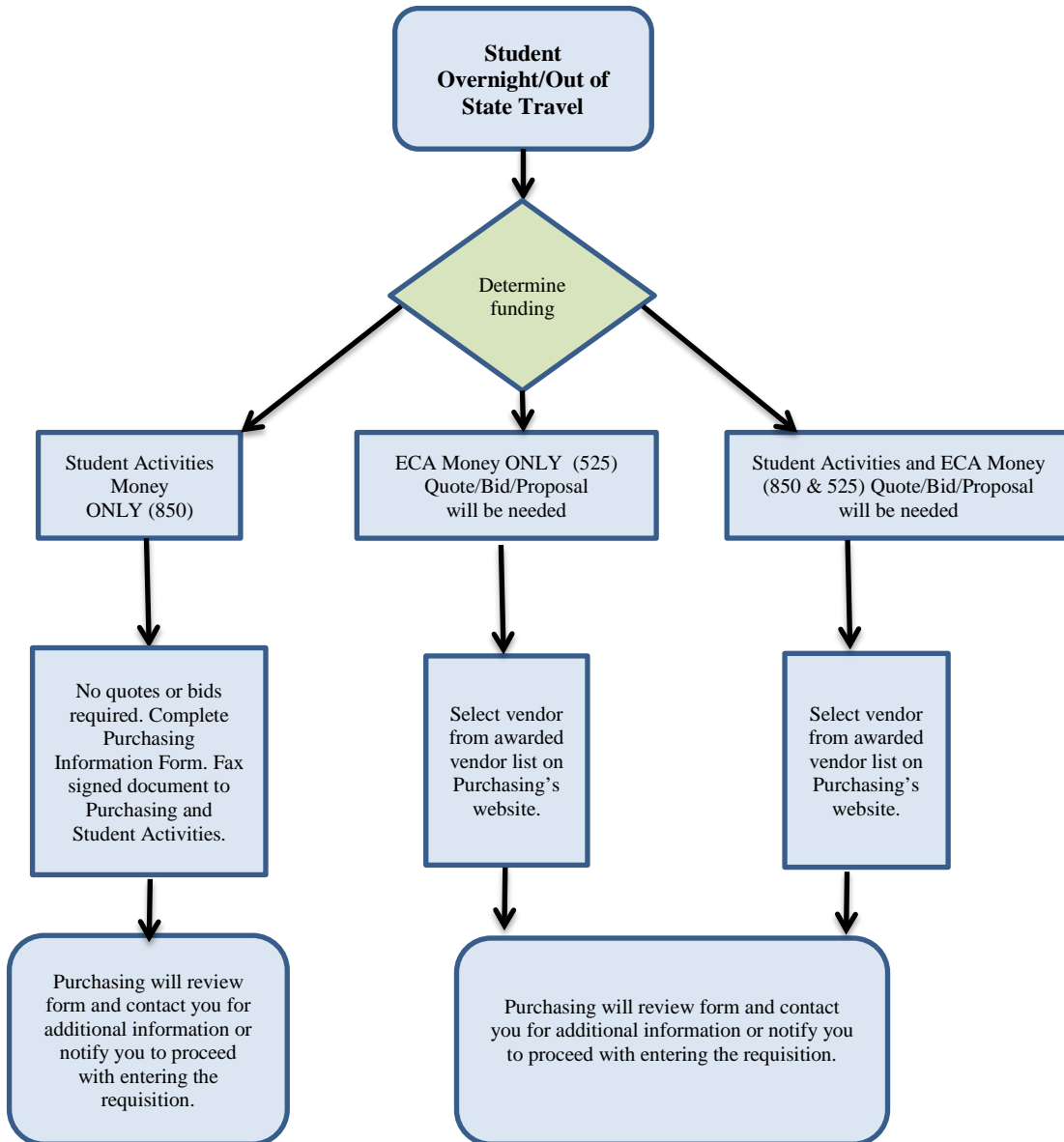
Before surplus materials are disposed of by trade-in to a vendor towards credit on a new requisition, the site must contact the Buyer Team for the product they want to purchase. The Buyer will determine if the trade-in offer is acceptable based on fair market value.

Student Travel Flow Chart

OVERNIGHT / OUT-OF-STATE STUDENT TRAVEL
Use this flowchart to determine if a Quote, Bid or Proposal is needed.

Questions??? Contact Purchasing Buyer Team 8
Leane Garrett (472-0148) or Danielle Crespin (472-0147)

Buyer Team 8 - Approved Travel Vendors
<http://www.mpsaz.org/purchasing/intra/buyers/buyer8/>





PURCHASING INFORMATION

Overnight/Out-Of-State Travel

If it is anticipated that the total cost of the trip will be \$9,500 or more, the first step in planning your trip is to notify the Purchasing Department to discuss the necessary procurement requirements. The Purchasing Department has contracts with:

- 6 camp facilities that provide services for science camps, band camps, and other groups.
- 18 vendors that provide educational student travel and group tour services.

A list of the approved vendors can be accessed on the MPS Purchasing Intranet Page under Buyer 8.

DO NOT sign any contracts/agreements with companies that are **not** listed on the approved vendor list. Approval must be obtained from the Purchasing Department in order to use a non-contracted vendor. **Competitive bids and quotes MUST be obtained unless you use one of the approved contracted vendors.**

Complete this form and fax it to Buyer 8 in Purchasing as soon as you are considering a trip. You must obtain the signature of a school administrator verifying you have shown this form to them.

School Name: _____ Group Traveling: _____

Contact Person: _____ Phone: _____

Travel Destination: _____

Name of Approved Vendor that is organizing the trip: _____

Dates: Leave on ___/___/___ Return on ___/___/___

Number of students: _____ Number of adults: _____ Number of adults free: _____

Itinerary: To Be Determined or Already Set **(Attach copy of itinerary)**

Will any ECA, Auxiliary, or District money be used? YES NO

School Administrator Signature: _____ **Date:** _____

Your Purchasing team can be reached at ext. 20147 or ext. 20148

FAX THIS PAGE TO BOTH PURCHASING (EXT. 20144) AND STUDENT ACTIVITIES (EXT. 20138)

OPERATIONS **WORK REQUEST** / **WORK ORDER** – GUIDELINES!!

WHY DO I NEED A **WORK REQUEST**?

Schools are heavily regulated. We must comply with all federal, state and local regulations regarding building codes, asbestos management, lead paint, other hazardous chemicals and indoor air quality among numerous other concerns. Generating a **work request** indicates that the appropriate individuals are contacted.

Any remodel, renovation or new site improvement, alterations, changes or repairs done to the building, site or grounds (including installation) will need a **work request** submitted on the TMA system, prior to having items or projects quoted and entered on OBARS. (NOTE: TMA refers to maintenance management software utilized by Operations to track and manage work process flow.)

[EXAMPLES – Not limited to]: Backstops/Dugouts, Basketball Standards (outdoor; permanent), Benches and Picnic Tables (Athletic and Outdoor), Concrete Install, Climbing Walls, Flagpoles, Flooring, Furniture (requiring install), Padded Mats (Gymnasium), Painting, Playground Equipment, Projector & Smart board Installs, Scoreboards, Shade Structures/Ramada, Shelving, Signing (Marquees’), Sound Systems (permanent), Tack Panel Installs, Volleyball/Tetherball, etc.

If it glues, screws, fastens or otherwise alters or changes the site, whether inside or outside, it will need a work request.



Once the **work request** is generated on the TMA system (ex: **436752**) it is printed by one of the work order clerks at Operations and issued to the designated trade shop or project manager responsible for addressing the needs of the school or site (**Work requests** may include more than one trade). The shop lead will assign the **work request** to the appropriate technician /project manager for that school or site.



Project Managers/Technicians will visit the school/site to speak with the requesting end user/(s) or appropriate personnel to develop a **“Scope of Work”** (this may include visits with suppliers/vendors) and to determine materials models, styles, types, dimensions (if applicable), etc. needed to fulfill the **work request**.



Project Managers will address Asbestos Containing Building Materials (ACBM) checks, if needed.



Once the **work request** has been scoped, calculated for cost and approved by the Director of Operations it is assigned a **Work Order Number** (ex: **OP-415456**). Operations shall verify funds with the school/site. Once funds are verified the project is ready to start. A requisition is entered on OBARS and purchase order created after financial approval is complete.

QUESTIONS: CALL (480) 472-6000 – OPERATIONS – Front Office