

# Purchasing with Federal Funds

EDGAR Procurement Training

# The Basics

# What is EDGAR?

- Education Department General Administrative Regulations
- Can be found at:
  - Title 2 Code of Federal Regulations (CFR) Part 200

# What's the Goal?

- Prove the price competitiveness of purchases
- Reduce fraud, waste & abuse
- Strengthen oversight
- Simplicity & consistency
- Increase efficiency

# EDGAR Procurement

- Who does this apply to?
  - All purchases made with Federal and State Pass-Thru Grant Funds
- What happens if we are not compliant?
  - Temporarily withhold cash payment pending correction
  - Disallow all or part of the costs
  - Wholly or partly suspend or terminate the Federal award
  - Withhold further Federal awards for the program
  - Take other remedies that may be legally available

# EDGAR Quote Guidelines

# Small Purchases: \$0-\$49,999.99

- Requires 3 **official** quotes from the vendor
  - No shopping carts unless retail/e-procurement vendors
    - Kroger, Walmart, Amazon (E-Procurement), Staples (E-Procurement), Sam's Club, etc.
- You must attach the EDGAR Form and all 3 quotes to your requisition
- If you are not choosing the lowest priced vendor you must complete the Evaluation Matrix & list your reasoning why on the EDGAR form
- All quotes must be obtained from reasonable vendors

# Quotes

- Regardless of price, all 3 quotes will be done using approved vendors when available.
  - If there are not approved vendors for the commodity, quotes from non-approved vendors are acceptable.
- If the vendor stipulates that they do not carry the product/service requested and submits a “No Bid”, this will still count as one of the three quotes needed.
- The requisition will not be approved until the quotes are received and evaluated by Purchasing.

*\*\*\*Quotes that have terms & conditions or contracts must go through the contract approval process before entering the requisition.*



All Enter keyword or product number

Purchase Group: TV ER MUNS

Departments

Buy Again Savings Hub Quantity Discounts

Account for Birdville L... Try Business Prime 99+

Shopping Cart



Pencil Grips - Pencil Grips for Kids Handwriting Pencil Grip Posture Correction Training Writing AIDS for Kids toddler Preschoolers Students Children Special Needs, Hollow Ventilation (8PCS)

Price \$6.99

Part of your order qualifies for FREE Shipping. Choose this option at checkout. See details

Subtotal (115 items): \$1,144.39

This order contains a gift

Proceed to checkout

In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 12 Delete Save for later

Pacon Chart Tablet, 24 x 16 Inches, 1-1/2 Inch Ruled Long Way, 25 Sheets - 384810

Price \$6.78



In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 42 Delete Save for later

Compare with similar items

Sponsored Products related to items in your cart

Tackie Markers: 201 \$13.99 See all buying options

Tackie Markers (Original) 92 \$12.49 See all buying options

GARUNK 1500 Pieces 463 \$28.00 See all buying options

Great Good Behavior 632 \$21.95 See all buying options



Pacon Handwriting Paper, D'Nealian Grades 2&3 / Zaner-Bloser Grade 2, 1/2" x 1/4" x 1/4" Ruled 8" x 10-1/2", Ruled Short, 40 Sheets

Price \$5.74

In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 40 Delete Save for later

Compare with similar items



Play-Doh Modeling Compound 10 Pack Case of Colors, Non-Toxic, Assorted Colors, 2 Oz Cans, Ages 2 & Up, (Amazon Exclusive), Multicolor

Price \$7.71

#1 Best Seller in Kids' Art Clay & Dough

In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 7 Delete Save for later

Compare with similar items



LEGO Classic Bricks Set - 10717 | 1500 Pieces | for Ages 4-99 | Plastic | 3 Levels of Building Complexity | Handy Brick Separator

Price \$56.36

In Stock

Shipped from: Big Deal Savings

Gift options not available. Learn more

Qty: 6 Delete Save for later

Compare with similar items

ples

Customer: Birdville ISD Quote no. 1577 Contact email:

Date: 8/25/2020



10 Pack Milife Pencil Grips - Children Pencil Holder Writing Aid Grip Trainer, Ergonomic Training Pen Grip Posture Correction Tool for Kids (Set of 10PCS)

In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 2 Delete Save for later

Compare with similar items



Phonics 4 DVD Set by Rock 'N Learn: Complete Phonics Program with 81 Printable Worksheets by Rock 'N Learn

Price \$26.98

DVD In Stock

Eligible for FREE Shipping

This is a gift Learn more

Qty: 4 Delete Save for later

Compare with similar items



Expo Vis-a-Vis Wet-Erase Marker, Fine Point, Black Ink, Dozen (SAN16001)

Price \$16.06

In Stock

Shipped from: Advantage Gifts

Gift options not available. Learn more

Qty: 2 Delete Save for later

Compare with similar items

Subtotal (115 items): \$1,144.39

Customer Service

# Incorrect Quote



MMF POS Advantage Cash Drawer - 5 Bill - 5 Coin - 3 Lock Position - USB, Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De

\$ 335.<sup>99</sup>

The screenshot shows an Amazon shopping cart page. At the top, there are navigation links for 'Hello, Sign in Account & Lists', 'Returns & Orders', and 'Try Prime'. A 'Cart' icon with the number '7' is visible. Below the navigation, there's a promotional banner for an Amazon Rewards Visa Card: 'Get a \$50 Amazon Gift Card instantly upon approval for the Amazon Rewards Visa Card'. A summary box shows: 'Current Total: \$ 71.17', 'Savings: - \$ 50.00', and 'After Cost Savings: \$ 21.17'. A 'Shopping Cart' section lists items: 'Quarter 1/4 inch Elastic for Sewing White 80 Yards' for \$7.99 (Qty: 1) and 'GENERAL PENCIL Cedar Point Pencil No.1/Xtr Soft 12/Box (43296780)' for \$8.85 (Qty: 3). A 'Sponsored Products' section shows '72 Professional...' for \$27.99, 'White 40-Yards Length...' for \$12.98, and 'COLOUR BLOCK 34PC...' for \$26.95. A 'Subtotal (7 items): \$71.17' is highlighted in yellow. A 'Proceed to checkout' button is present.

# EDGAR Form & Matrix

# Current EDGAR Form

What is being purchased?  
Example: Snacks for ASPIRE program

What is the budget code?

**BISD EDGAR QUOTE FORM**

When using federal funds, three formal quotes must be obtained. The only exception would be for local retail where a quote cannot be provided from Walmart, Hobby Lobby, and Kroger. Approved vendors should be utilized if possible.

Indicate the requested vendor in the space provided. The vendor offering the lowest cost will have a green total. If vendor recommended does not offer the lowest cost, utilize the matrix on the second page as well as provide an explanation in the space provided. Attach both EDGAR form and Matrix to requisition.

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**Explanation of items to be purchased:**

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**Funding Source:**

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All information requested must be completed. If vendor is not in the system, you must complete the necessary vendor paperwork. Attach additional sheets if necessary.

|  |      | Vendor #1  |           | Vendor #2  |           | Vendor #3  |           |
|--|------|------------|-----------|------------|-----------|------------|-----------|
| Vendor Name                                  |      |            |           |            |           |            |           |
| Contact                                      |      |            |           |            |           |            |           |
| Phone Number                                 |      |            |           |            |           |            |           |
| Item Description<br>(Include catalog/item #) | Qty. | Unit Price | Ext Price | Unit Price | Ext Price | Unit Price | Ext Price |
| 1  |      |            | \$ -      |            | \$ -      |            | \$ -      |
| 2  |      |            | \$ -      |            | \$ -      |            | \$ -      |
| 3  |      |            | \$ -      |            | \$ -      |            | \$ -      |
| 4  |      |            | \$ -      |            | \$ -      |            | \$ -      |
| 5  |      |            | \$ -      |            | \$ -      |            | \$ -      |

List out each vendor you received a quote from.  
3 are always required.

List out each item that is going to be purchased.  
See attached quote is not acceptable.

# Current EDGAR Form

If freight is listed on the quote make sure to include it here.

|  |          |   |          |
|--|----------|---|----------|
| Freight<br>(Total shipping & handling charges)   |          |   |          |
| Total Cost   | \$ 10.00 | \$ 20.00  | \$ 30.00 |
| <a href="#">Click Here to Remove Empty Rows</a>  |          | <a href="#">Click Here to Unhide Empty Rows</a> |          |
| <b>Indicate the vendor recommended. Provide an explanation and matrix score if not selecting lowest price quote.</b> |          |   |          |
| Teacher/Course:  |          | Campus:   |          |
| Email:   |          | Room#:  |          |
| Phone #  |          | Date:   |          |

Totals will auto-calculate for you. Make sure these totals match your quote.

The green total will be the one with the lowest pricing.

Who are you recommending for this order & why?

Requestors information



# Current Evaluation Matrix

Auto-populates with correct % from your EDGAR form.

**EDGAR  
Evaluation Matrix**

| Evaluation Factor                 | % Points    | Vendor #1    | Vendor #2    | Vendor #3    |
|-----------------------------------|-------------|--------------|--------------|--------------|
| Price                             | 55%         | 55.00        | 27.50        | 18.33        |
| Good/Services Meet District Needs | 30%         |              |              |              |
| Timeframe/Delivery                | 10%         |              |              |              |
| Past Experience with the District | 5%          |              |              |              |
| <b>TOTAL</b>                      | <b>100%</b> | <b>55.00</b> | <b>27.50</b> | <b>18.33</b> |

**Price** = lowest cost divided by vendor cost multiplied by percentage points  
**All other Evaluation Factors** = indicate score (not to exceed total number of points listed) based on the qualitative evaluation of the end user for the products or services to be purchased

Total auto-populates from the fields above. You should be picking the vendor with the **highest** percentage.

You complete this. If downgrading a vendor you need to explain why.

# Sneak Peek: New Matrix

**COMING  
SOON!**

## EDGAR Evaluation Matrix

**\*\*Required if not choosing the lowest priced vendor\*\***

| <b>Vendor #1 Name:</b>             |                       |              |                               |
|------------------------------------|-----------------------|--------------|-------------------------------|
| <b>Evaluation Factors</b>          | <b>Max % Possible</b> | <b>Score</b> | <b>Reason for downgrading</b> |
| Price                              | 55%                   |              |                               |
| Goods/Services meet district needs | 30%                   |              |                               |
| Timeframe/Delivery                 | 10%                   |              |                               |
| Past Experience with the district  | 5%                    |              |                               |
| <b>Total</b>                       | <b>100%</b>           |              |                               |

  

| <b>Vendor #2 Name:</b>             |                       |              |                               |
|------------------------------------|-----------------------|--------------|-------------------------------|
| <b>Evaluation Factors</b>          | <b>Max % Possible</b> | <b>Score</b> | <b>Reason for downgrading</b> |
| Price                              | 55%                   |              |                               |
| Goods/Services meet district needs | 30%                   |              |                               |
| Timeframe/Delivery                 | 10%                   |              |                               |
| Past Experience with the district  | 5%                    |              |                               |
| <b>Total</b>                       | <b>100%</b>           |              |                               |

  

| <b>Vendor #3 Name:</b>             |                       |              |                               |
|------------------------------------|-----------------------|--------------|-------------------------------|
| <b>Evaluation Factors</b>          | <b>Max % Possible</b> | <b>Score</b> | <b>Reason for downgrading</b> |
| Price                              | 55%                   |              |                               |
| Goods/Services meet district needs | 30%                   |              |                               |
| Timeframe/Delivery                 | 10%                   |              |                               |
| Past Experience with the district  | 5%                    |              |                               |
| <b>Total</b>                       | <b>100%</b>           |              |                               |

Provide a detailed explanation for not picking the lowest price quote.

# Shopper Card Purchases



# Shopper Card Procedures

- After the requisition is converted to a PO
- The delivery reference will be contacted to pick up the card.
  - Receiving the approved PO is **not** a notification to pick the card up.
  - The card must be signed out & rules must be signed each time the card is picked up.
- The card must be returned on or before the date given (typically 2 business days)
- Only the purchase of items listed on the EDGAR document are approved. The total and items should match up exactly.

\*\*\*Failure to follow any of these rules may result in revoked privileges of the shopper card program.

**Q&A**