Purchasing with Federal Funds

EDGAR Procurement Training

The Basics

What is EDGAR?

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

What's the Goal?

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

EDGAR Procurement

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

EDGAR Quote Guidelines

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

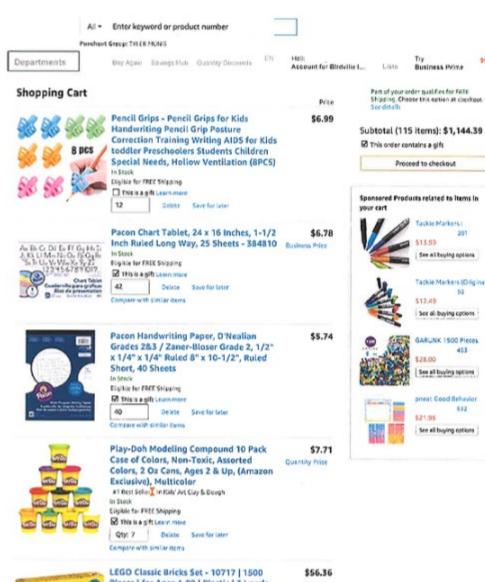
- O Requires 3 **official** quotes from the vendor
 - O No shopping carts unless retail/e-procurement vendors
 - O Kroger, Walmart, Amazon (E-Procurement), Staples (E-Procurement), Sam's Club, etc.
- You must attach the EDGAR Form and all 3 quotes to your requisition
- O If you are not choosing the lowest 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.
 - O 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.

Amazon.com Shopping Cart Page 1 of 3



Pieces | for Ages 4-99 | Plastic | 3 Levels of Building Complexity | Handy Brick Separator

SN'sped from: Big Deal Savings Gift options not available. Learn more

Delete Save for later

Compare with similar items written notice of termine

22+

Business Prine

Tackie Marketus

See all buying options

Tackle Markers (Original

See all buying options

SARUNK 1500 Pieces

See all buying options

pneat Good Behavior 652

See all buying options

453

\$12.49

Customer: Birdville ISD Quote no. 1577 Contact email:

Date: 8/25/2020

Amazon.com Shopping Cart

Page 2 of 3



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

Eligible for FREE Shipping

This is a gift Learn more.

Qtyr 2 Delete Save for later

Compare with similar items



Exervis .

400 T

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

Printable Worksheets by Rock N Learn

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)

Shipped from Advantage Gifts

Gift options not available. Leave more

Qtyl: 2 delete Save for later

Compare with similar items

Subtotal (115 items): \$1,144.39

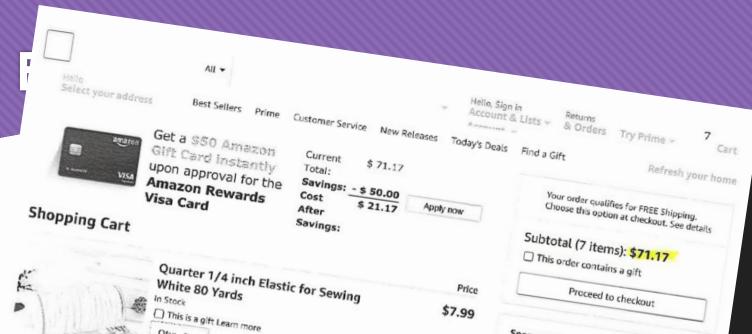
\$26.98

\$16.06

Quantity Price



Incorrect Quote

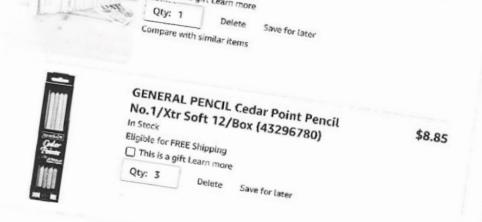


\$5.65



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 Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 16.7" De Steel, Metal, Steel, ABS Plastic - Putty - 4.6" Height x 18" Width x 18" Width x 16.7" De Steel, ABS Plastic - Putty - 4.6" Width x 18" Width x

s 335 ^{.99}





EDGAR Form & Matrix

Current EDGAR Form

What is being purchased? Example: Snacks for ASPIRE program

BISD EDGAR QUOTE FORM

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

cate 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.

PRINT

CLEAR

3 are always required.

List out each vendor

You received a quote

Funding Source:

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.

Explanation of items to be purchased:

			Vend	or #1	Vend	lor #2	Vend	lor #3
	Vendor Name							
	Contact							
	Phone Number							
	Item Description							
	(Include catalog/item #)	Qty.	Unit Price	Ext Price	Unit Price	Ext Price	Unit Price	Ext Price
	1			\$ -		\$ -		\$ -
:	2			\$ -		\$ -		\$ -
	3			\$ -		\$ -		\$ -
4	1			\$ -		\$ -		\$ -
	, I			\$ -		\$ -		\$ -

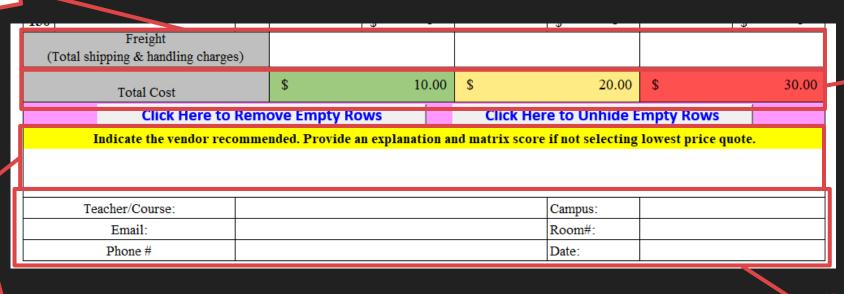
List out each item that is going to be purchased. See attached quote is

not acceptable.

What is the budget code?

Current EDGAR Form

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



Totals will autocalculate 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.

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

EDGAR Evaluation Matrix

Evaluation Factor	% Points	▼ Vendor #1 ▼	Vendor #2 ▼	Vendor #1 v
Price	55%	55.00	27.50	18.33
Good/Services Meet District Needs	30%	l		
Timeframe/Delivery	10%			
Past Experience with the District	5%			
TOTAL	100%	55.00	27.50	18.33

Price = lowest cost divided by vendor cost multipled 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

You complete this.

If downgrading a vendor you need to explain why.

Sneak Peek: New Matrix



Required if not choosing the lowest priced vendor

Vendor #1 Name:			
Evaluation Factors	Max % Possible	Score	Reason for downgrading
Price	55%		
Goods/Services meet district needs	30%		
Timeframe/Delivery	10%		
Past Experience with the district	5%		
Total	100%		
Vendor #2 Name:			
Evaluation Factors	Max % Possible	Score	Reason for downgrading
Price	55%		
Goods/Services meet district needs	30%		
Timeframe/Delivery	10%		
Past Experience with the district	5%		
Total	100%		
Vendor #3 Name:			
Evaluation Factors	Max % Possible	Score	Reason for downgrading
Price	55%		
Goods/Services meet district needs	30%		
Timeframe/Delivery	10%		
Past Experience with the district	5%		
Total	100%		

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.
 - O Receiving the approved PO is **not** a notification to pick the card up.
 - O 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