
Vendor Qualification and Evaluation Procedure (PUR-P004)

Milford Public School District

1.0 SCOPE:

- 1.1 This procedure describes the process in which the Purchasing Department processes vendor qualifications and evaluates vendors in the Milford Public School District.

The on-line version of this procedure is official. All printed versions are uncontrolled copies.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent of Operations

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent of Operations

Authorized Signature on File

Signature

Date

4.0 DEFINITIONS:

- 4.1 CIMS – financial database

5.0 PROCEDURE: -

- 5.1 The Purchasing Department reviews and evaluates vendors annually.
- 5.1.1 If a vendor has had no activity for at least three (3) years, the vendor is purged from the CIMS System.
- 5.1.2 If a vendor has been deemed unacceptable due to, but not limited to, customer complaints, inadequate service, late shipments, damaged goods, and/or poor evaluations, Purchasing elects to hold all new orders in the CIMS system by making the vendor inactive.
- 5.1.2.1 Purchasing Department initiates “hold” by advising Accounts Payable Department to mark these vendors inactive in the CIMS system, thus preventing use of this vendor by all departments.
- 5.1.3 PUR-F007 is used for the annual evaluation of a vendor and issued by the Purchasing Department to appropriate department / staff for completion.
- 5.1.3.1 Vendor selected randomly for annual evaluation by the Deputy Superintendent of Operations or his/her designee.
- 5.1.3.1.1 Approximately 50 vendors randomly selected each year.
- 5.1.3.1.2 Unless previous evaluation or circumstances warrant a repeat evaluation, no vendor is evaluated twice within a three (3) year period.
- 5.1.3.2 Purchasing Department Staff distributes evaluation forms to appropriate staff members/departments.
- 5.1.3.3 Results tabulated on a summary sheet and assessed by Purchasing Department Staff.

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5.1.3.3.1 If a vendor has a rating of N/A by the person evaluating them, the purchasing department staff will assign a value of "3" to the n/a rating. This should not influence the overall rating either adversely or favorably.

5.1.3.4 Vendors rated poorly dropped from vendor list.

5.1.3.4.1 Accounts Payable Department advised to inactivate vendors in CIMS financial database.

5.1.4 Purchasing reviews/investigates as necessary and any Vendor Service Forms (PUR-F013) received.

5.1.4.1 Review / Investigation may include, but is not limited to:

5.1.4.1.1 Contacting other users of same vendor

5.1.4.1.2 Contacting vendor or sales staff directly

5.1.4.1.3 Advising Accounts Payable Department to mark vendor inactive if circumstances call for such action.

6.0 ASSOCIATED DOCUMENTS:

6.1 CIMS Vendor Volume History Report

6.2 Vendor Evaluation Form – PUR-F007

6.3 Vendor Service Form – PUR-F013

6.4 Evaluation Summary Sheet (related MSOffice document)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
CIMS Database	Electronic	Permanent	N/A	Electronic
PUR-F007	Purchasing Office	Five (5) years	Discard as desired	Locked Office
PUR-F00x	Purchasing Office	Five (5) years	Discard as desired	Locked Office
Evaluation Summary Sheet	Purchasing Office	Five (5) years	Discard as desired	Locked Office

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8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
08/25/2003	A	Initial Release
09/24/2003	B	Change 5.4.3 and add 5.4.3.1, 5.4.3.2 and 5.4.3.3. Change Form PUR-F007 name.
11/02/05	C	Change title of staff in 2.0; change approval authority in 3.0; add/delete language in 4.0; 5.0; 6.0 and 7.0

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