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# VENDOR SELECTION, EVALUATION AND RE-EVALUATION

## Procedure PUR-P002

Sacramento City Unified School District

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### 1.0 SCOPE:

- 1.1 This procedure discusses the process that is used to add to or maintain the supplier and Bidders' List and file for Sacramento City Unified School District.

### 2.0 RESPONSIBILITY:

- 2.1 Purchasing Supervisor/Buyer

### 3.0 APPROVAL AUTHORITY:

- |     |                        |       |
|-----|------------------------|-------|
|     | _____                  | _____ |
|     | Signature              | Date  |
| 3.1 | Director of Purchasing |       |

### 4.0 DEFINITIONS:

- 4.1 SCUSD: Sacramento City Unified School District
- 4.2 IRS: Internal Revenue Service

### 5.0 PROCEDURE:

- 5.1 Criteria for vendor evaluation and selection: all vendors on the SCUSD vendor list are electronically listed in the district's Escape vendor file.
- 5.2 All vendors are given an opportunity to do business with SCUSD.
- 5.3 Vendors are evaluated on their ability to be lowest responsible bidder and to deliver best price, quality, and service to achieve customer satisfaction.
  - 5.3.1 Purchasing Services Department receives request from new vendor to be added to the vendor list.
  - 5.3.2 Vendor application and IRS W-9 form requesting Federal Tax ID number or Social Security number are obtained through Purchasing Services web page at <http://inside.sac-city.k12.ca.us>, faxed, e-mailed, or mailed. (Form PUR-F007)
  - 5.3.3 Purchasing Services Department receives and reviews vendor application and creates a vendor record in the Escape vendor file.
  - 5.3.4 Vendor acceptance letter is mailed, which directs the new vendor to contact the appropriate buyer to discuss district policies and procedures and products.
  - 5.3.5 The vendor application is filed.
  - 5.3.6 The completed IRS W-9 form is sent to General Accounting to file.
- 5.4 Criteria for vendor evaluation:
  - 5.4.1 Delivery
  - 5.4.2 Responsiveness

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- 5.4.3 Follow-up
- 5.4.4 Communication
- 5.4.5 Address problems first time
- 5.5 Criteria for vendor re-evaluation also includes consistency and resolutions to the issues to the satisfactory of the district.
- 5.6 Inability to satisfy any of the above criteria to the satisfaction of the Purchasing Department results in the vendor being inactivated on-line in the Escape Vendor File. Those vendors are no longer evaluated and will not receive future bids or purchase orders.
- 5.7 Vendor evaluation is on-going throughout the school year.
- 5.8 Any comments/problems/resolutions with a vendor will be maintained in the Vendor Re-Evaluation e-file.

### 6.0 ASSOCIATED DOCUMENTS:

- 6.1 Vendor application (PUR-F007)
- 6.2 IRS W-9 Form
- 6.3 Acceptance letter
- 6.4 Vendor Re-evaluation e-file
- 6.5 Vendor List (Escape electronic vendor file)

### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Vendor Application	Purchasing Office	3 years	Discard as desired	Secured Warehouse
Vendor Re-Evaluation	Intranet	3 years	Discard as desired	Secured Information Services/Serna Center

### 8.0 REVISIONS:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revisions:</u>
12/13/04	A	Initial release
3/08/05	B	Added criteria for vendor re-evaluation process
03/14/08	C	Revised 5.3.2

\* \* \* E n d o f P r o c e d u r e \* \* \*