



**COMMUNITY
PURCHASING
ALLIANCE**

DC PCSB \$25k+ Procurement Compliance

Overview of Exemptions

Updated with PCSB's
Nov 21, 2016 Guidance

February 23, 2017

- On 11/21/2016 DC PCSB Updated their rules!
 - PCSB Clarified the exemptions to the required process for contracts over \$25,000 / year
- **The Result:** a significant reduction in effort/paperwork needed for compliance when using the brokered services, cooperative purchasing, utilities or
- **26 exemptions** listed by PCSB on pages 4 & 5 of their report: <http://bit.ly/PCSBPolicyUpdate>
- For example, "Cooperative Purchasing" which was formerly a footnote is now officially listed in Section III, Sub-section B - on the next slide
- These slides review some of the highlights.
- More available at cpa.coop/

B. Exemptions to Bidding Requirements for Procurement Contracts

DC PCSB does not request or review bidding documentation for the following types of Procurement Contracts. DC PCSB may nonetheless require submission of other Procurement Contract Documents for these types of Procurement Contracts.

Procurements through Cooperative Purchasing Agreements: Cooperative Purchasing Agreements are contract vehicles where a lead agency has competitively bid a master contract on behalf of public agencies and nonprofit organizations. In many cases, the lead agency has selected a vendor who is offering its goods or services at advantageous prices. While DC PCSB does not endorse any Cooperative Purchasing Agreement, two examples are US Communities Government Purchasing Alliance (<http://www.uscommunities.org/>) and National Cooperative Purchasing Alliance (<http://ncpa.us/Home>).

Cooperative Purchasing Agreement Purchases	Submission Required?
Contract Submission Data Form	Yes
RFP	The public charter school must submit the lead agency's RFP.
Evidence of public notification	No
Bids received	No
Written justification for award	No
Executed contract	Yes
Draft board minutes	The public charter school must submit draft board minutes and a description of the conflict of interest <u>only</u> for conflicting interest transactions.
Description of conflict of interest	

Brokered Services	Submission Required?
Contract Submission Data Form	Yes
RFP	No
Evidence of public notification	No
Bids received	The public charter school must submit evidence that the broker solicited the services from a range of providers and provided comparative terms, conditions, and pricing of different providers.
Written justification for award	Yes
Executed contract	No
Draft board minutes	The public charter school must submit draft board minutes and a description of the conflict of interest <u>only</u> for conflicting interest transactions.
Description of conflict of interest	

Renewals	Submission Required?
Contract Submission Data Form	Yes
RFP	No
Evidence of public notification	No
Bids received	No
Written justification for award	No
Executed contract	Yes
Draft board minutes	The public charter school must submit draft board minutes and a description of the conflict of interest <u>only</u> for conflicting interest transactions.
Description of conflict of interest	

Utilities	Submission Required?
Contract Submission Data Form	No
RFP	No
Evidence of public notification	No
Bids received	No
Written justification for award	No
Executed contract	No
Draft board minutes	No
Description of conflict of interest	No